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ABSTRACT

This study traces educational policy development and implementation in the postcolonial era in eight sub-Saharan African countries. A basic premise is that the education system in any country is a result of interacting forces in the unique historical development of the country. The volume analyzes the forces in terms of their relevance and applicability to the South African situation, especially as far as donor funding is concerned. The countries of the study are Botswana, Kenya, Lesotho, Malawi, Swaziland, Tanzania, Zambia, and Zimbabwe. Chapters of the book include: (1) "Background to the Study"; (2) "Educational Development in Postcolonial Africa"; (3) "Donor Aid to Africa"; (4) "Policy Options for Educational Development in Africa"; and (5) "Policy Options for Donor Aid." Six tables and 14 figures accompany the text. Two appendices and a 44-item bibliography conclude the text. (EH)

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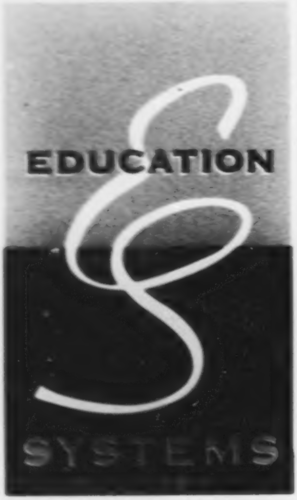

EDUCATION SYSTEMS

IN POSTCOLONIAL AFRICA

A STUDY OF A SELECTED NUMBER OF AFRICAN COUNTRIES

U.S. DEPARTMENT OF EDUCATION
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OF EDUCATION SYSTEMS
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A STUDY OF A SELECTED NUMBER
OF AFRICAN COUNTRIES

THE DEVELOPMENT OF EDUCATION SYSTEMS IN POSTCOLONIAL AFRICA:

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F.J. NIEUWENHUIS

HSRC
Pretoria
1996

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ACRONYMS

ADB - African Development Bank
ATTS - Automotive Trade Training School
BANFES - Basic and Non-Formal Education System
CEO - Chief Education Officer
CIDA - Canadian International Development Agency
COSC - Cambridge Overseas School Certificate
DAC - Development Assistance Committee of OECD
DACON - Databases of Consultants of the World Bank
DAETF - Donors in Africa Education and Training Forum
DANIDA - Danish International Development Agency
DTEVT - Department of Technical Education and Vocational Training
EEC - European Economic Community
ESAP - Education Sector Adjustment Programme
FAO - Food and Agricultural Organization of UN
FER - Framework for Economic Recovery
FINNIDA - Finnish International Development Agency
FNDP - Fourth National Development Plan
GCE - General Certificate of Education
GDP - Gross Domestic Product
GDS - German Development Services
GNP - Gross National Product
GTZ - German Development Agency
GVS - German Volunteer Service
IBRD - International Bank for Reconstruction and Development
ILO - International Labour Office
IMF - International Monetary Fund
INM - Imbokodvo National Movement
JC - Junior Certificate
JICA - Japan International Co-operation Agency

KANU - Kenya African National Union

KIE - Kenya Institute of Education

LITESP - Lesotho/Ireland Technical Education Support Project

M - Maloti (1M = 1 rand)

MEPD - Ministry of Economic Planning and Development

MMD - Movement for Multi-party Democracy

MTTC - Maditrelo Trade Testing Centre

NCC - National Craft Certificate

NCDC - National Curriculum Development Centre

NCE - National Commission on Education (1993) (Botswana)

NCEOP - National Commission for Education Objectives and Policy (Kenya)

NERCOM - National Education Commission (1985) (Swaziland)

NFC - National Formation Certificate (Zimbabwe)

NGO - Non-Government Organization

NORAD - Norwegian Agency For Development

ODA - Overseas Development Administration

OECD - Organization for Economic Co-operation and Development

OPEC - Organisation of Petroleum Exporting Countries

PEIP - Primary Education Improvement Project

SADCC - Southern African Development Co-ordination Conference

SCOT - Swaziland College of Technology

SIDA - Swedish International Development Agency

SPSC - Swaziland Primary School Certificate

TNDP - Transitional National Development Programme (Zimbabwe)

TNDP - Third National Development Plan

TSTC - Thaba Tseka Skills Training Centre

TTI - Trade Training Institute

TVET - Technical and Vocational Education and Training

UDI - Unilateral Declaration of Independence

UNDP - United Nations Development Programme

UNIP - United National Independence Party

UNISWA - University of Swaziland

UNZA - University of Zambia

UPE - Universal Primary Education

USAID - United States of America Agency for International Development

VOCTIM - Gwamile Vocational and Commercial Training Institute

VTC - Vocational Training Centre

WB - World Bank

YTC - Youth Training Centre

ZANU(PF) - Zimbabwe African National Union (Patriotic Front)

ZAPU - Zimbabwe African Peoples Union

ZNCC - Zimbabwe National Craft Certificate

PREFACE

The year 1994 saw South Africa finally moving into its postcolonial phase and with this the challenge to fully take its place as an African country. Years of isolation from the rest of Africa had led to contact with educational development in Africa taking a low profile. Many educationists in South Africa had been forced to rely mainly on information from Europe and the USA for educational innovation.

South African educationists, however, need to acquaint themselves with the developments and experiences of other countries in Africa, and cannot assume that the influences impacting on education in the rest of Africa will not affect South Africa.

This report attempts to summarize the findings of a study tour aimed at highlighting some of the educational developments in a number of African countries. It focuses on the policies developed to address the challenges facing education in developing communities in times of economic recession and on the implementation of those policies. At the same time, broad trends in donor support for educational priorities are discussed with the aim of outlining some broad guidelines that could be used in developing a policy for donor aid.

I am grateful for the opportunity afforded me by the Human Sciences Research Council to undertake this study and I trust that the findings reported here will also contribute to the long-term objectives of the council.

JAN NIEUWENHUIS

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CHAPTER 1

BACKGROUND TO THE STUDY

> *If H.G. Wells was correct when he said that human history becomes more and more a race between education and catastrophe, then we should prepare our survival shelters. The race is almost lost, and with it the human race.*
>
> (John Bremer, 1992)

1.1 INTRODUCTION

South Africa and its neighbours share many problems in the field of education. Education authorities wrestle with the question of quality in education while trying to improve accessibility, equality and equity. They must also contend with claims of irrelevant curricula for school and vocational training and with finding mechanisms to fund and expand the education system to cope with the ever-increasing demand for education, as population growth outstrips economic performance. These governments are furthermore faced with overcrowded classrooms and a lack of proper resources to create effective teaching and learning environments. Dwindling economies and economic pressures on the population may force some countries to sacrifice schooling to meet basic needs. (*SA Economist*, 1992; Watson, 1994)

Unemployment has already become one of Africa's most pressing problems with some 100 million people unemployed in 1989 - the majority of these being women and young men. At the same time, Africa faces one of its most serious skills shortages.

Against this background researchers and educationists in Africa and abroad have called for the restructuring of the education systems of African countries; to find ways to cope with the challenges facing education.

At the same time, it should be borne in mind that, with the new political and educational dispensation taking root in South Africa, there are increased expectations for a more just and equitable education system that will eliminate the injustices of the past. Implicit in this rise in expectations is the hope that donor aid will assist in bringing about a new, restructured education system. Africa, with its long-standing association with donor aid, may offer some valuable insights into the development of a policy for donor aid.

In the light of these trends, it was deemed necessary to conduct an in-depth study of the development of education systems in postcolonial Africa and, at the same time, to study the impact of donor agencies and countries on these developments.

1.2 RESEARCH DESIGN

An in-depth study was undertaken of eight countries - all of them former British colonies (Botswana, Kenya, Lesotho, Malawi, Tanzania, Swaziland, Zambia and Zimbabwe) - with a view to tracing and documenting educational changes in these countries since their independence. Three of these countries (Tanzania, Malawi, Kenya) are regarded as low-income countries with Tanzania and Malawi at the bottom end of the scale. (World Bank, 1988) More recent World Bank publications include Zambia and

Lesotho in the list of low-income countries, while Swaziland, Zimbabwe and Botswana are regarded as middle-income countries with Botswana moving into the top of the range.

Until recently, Tanzania, Kenya and Zambia were predominantly socialist in orientation. Zimbabwe proclaimed a Marxist-Leninist philosophy, while Botswana, Lesotho, Swaziland and Malawi adopted a more free-market orientation, albeit under the strong influence of South Africa. In Swaziland and Lesotho the traditional monarchy exerted a strong influence on political developments. Tanzania, Kenya, and Zambia were strong one-party states, while the government of Malawi could best have been described as a dictatorship. Botswana and Zimbabwe have been multiparty democracies, although the leadership in Zimbabwe is striving towards the creation of a one-party state.

In the light of the above, it was thought that these countries would give a good indication of former British colonies across the spectrum of economic development and political orientation.

Literature on development in Africa in general, and the provision of education in particular, abounds. (See Graig, 1990.) It was, however, difficult to extract the underlying policies, feelings and motivations sought for this investigation from the literature and statistical reports as the focus of this study was on the implementers of educational policies and the recipients of donor aid and their views on the benefits of donor aid and not so much on the views of donors.

Apart from literature studied, in-depth interviews were conducted with senior officials in ministries of education and academics at universities in the countries visited. (See list of interviews in Appendix A.) Each interview lasted on average 45 to 60 minutes. A structured interview schedule was used. (See Appendix B.)

Literature (such as official policy documents and development plans not available in South Africa) was obtained and consulted in drafting the reports. Clarification of these documents often necessitated a second or third visit to an official to gain further information. In conjunction with this, visits to schools, polytechnics, universities and other educational institutions were undertaken to observe the training being offered.

The time allocated to each country differed depending on the information available prior to the study and the travelling time needed to reach the next destination[1]:

- Botswana (5 days - much information had already been gathered during previous visits);
- Zimbabwe (5 days);
- Zambia (5 days, concentrated in Lusaka);
- Malawi (10 days - some information from a previous visit and contacts were available);
- Kenya (12 days - based mainly at Kenyatta University and in Nairobi);
- Tanzania (12 days - mainly at University of Dar es Salaam);
- Lesotho (4 days - some information from a previous visit was available);
- Swaziland (5 days).

Although the initial scope of the project was very broad it soon became evident that more focus was needed. It was decided to concentrate on educational policy and planning and to do case studies on one or two donor aid projects only. These case studies are dealt with in country specific reports produced for each country studied. The interested reader is referred to these reports and the literature list for further information on any specific country.

1.3 THEORETICAL FRAMEWORK

1.3.1 Introduction

This study attempts to address two important issues that are closely related in Africa: the development of the education systems of certain countries and the role of donor aid in this respect. Both these are closely related to policy formulation and policy implementation. It would therefore be appropriate to consider some of the aspects concerning policy formulation and implementation as a framework to the study.

1.3.2 Educational policies[2] in postcolonial Africa

In all the countries studied, education was viewed as one of the important vehicles for bringing about development and change. The countries had all inherited underdeveloped and racially segregated education systems that were characterized by inequalities and regarded as irrelevant to the needs of the country. (See Mosha, 1993; Harber, 1989; Monyooe, 1994.)

These countries were therefore set on reforming or restructuring their education systems, adjusting the length of education cycles, changing curriculum content and linking education and training to perceived requirements for national socio-economic development. (Thurlow, 1992.)

A basic assumption that has guided educational policy development in Africa is that education offers the key to economic growth, restructuring of the social order and to reducing the social ills of the country at large.

It is true that empirical research (Psacharopoulos, 1990; Fuller, 1991; Delacroix and Ragin, 1978) generally points to a positive effect of education on economic development and a strong association with an impressive physical quality of life. (Bradshaw, 1993.) However, it would be a fallacy to think that any kind of education would yield the necessary returns. The search for the specific kind of education needed, be it basic education, a liberal education or vocational-oriented education, is one of the main issues that has confronted educationists and educational policy makers for a number of decades already. Some major shifts in thinking on this issue have taken place over time.

(1) Concentration[3] in policy formulation

Internationally, in both developed and developing countries, concentration of interest within educational planning and the allocation of funds have shifted over time. During the sixties and seventies it was concentrated on educational expansion in primary and secondary education as the investment field with the highest direct economic pay-off. (Hinchliffe, 1988, Psacharopoulos, 1990, Watson, 1994.) During the eighties the concentration shifted to prevocational and vocational education and training.

> *The 1990 World Conference on Education for all, held in Jomtien, Thailand, culminated in the "World Declaration on Education for All". In this statement the conference reaffirms the international community's commitment to ensure the right to education for all people. Subsequently, the International Consultative Forum was established to monitor progress toward Education for All (EFA) and to promote consultation and cooperation at a global level.*

This shift may be attributed to the widespread unemployment of school-leavers and the static nature of the formal economic sector. At the World Conference on Education For All held in Jomtien (1990), Third World governments and donors alike committed themselves to increasing their support for universal primary education.

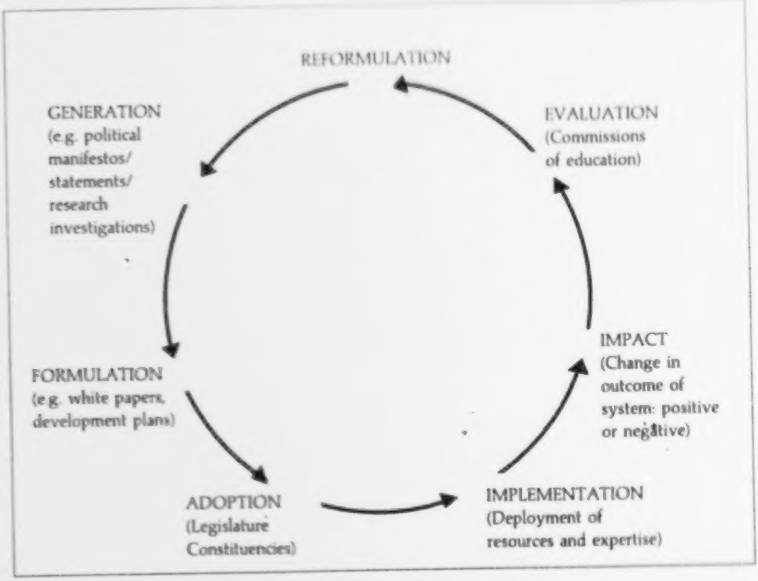
It seems obvious to assume that these leaps in concentration had a direct impact on educational policies in developing countries and on the flow of donor aid. These assumptions will be explored further in this study.

(2) Discrepancy between policy formulation and implementation

One of the aspects of education innovation in Africa is the discrepancy between the formulation and implementation of educational policies in the context of the wider socio-economic and political development process. (Buchert, 1994; Thurlow, 1992.)

The policy cycle may be described as comprising seven distinct and logical sequential stages. (See Fullan, Pomfret, 1977; Papagiannis *et al.*, 1982; Sabatier and Mazmanian, 1982; Graig, 1990.) These stages are schematically illustrated in Figure 1.1. This study does not permit an in-depth review of all the stages of the policy cycle. A few brief notes should therefore suffice.

FIGURE 1.1
SCHEMATIC PRESENTATION OF THE POLICY CYCLE


REFORMULATION
GENERATION (e.g. political manifestos/ statements/ research investigations)
EVALUATION (Commissions of education)
FORMULATION (e.g. white papers, development plans)
IMPACT (Change in outcome of system: positive or negative)
ADOPTION (Legislature Constituencies)
IMPLEMENTATION (Deployment of resources and expertise)

Education policy *generation* in the countries surveyed took various forms. The most common trend was for political figures to issue party manifestos or statements that seemed to guide education for extended periods of time. (See Tanzania's policy on *Education for Self-Reliance*, the *Harambee Schools* in Kenya, the *ZANU (PF) Manifesto* of 1980 and 1985, and the *Imbokodvo National Movement Manifesto* of Swaziland.) In other cases education policy was generated through research investigations or commissions on education which reviewed the *status quo* in education and came up with specific recommendations to guide future policy. (See Botswana, Swaziland, Malawi and Kenya.)

These broadly defined educational policies served as a basis for the *formulation* of education policy. In the case of the countries studied, the policies formulated were released as white papers on education (Botswana) or as part of the national development plan (Lesotho, Malawi, Swaziland).

The contributions from donors during these stages vary. In Lesotho, for example, the World Bank played a major role in the formulation of the Fifth Five Year Development Plan for Education. Certain macropolicy setting forums (the All African Conference on Education of 1961, the Jomtien Education for All Conference of 1990) seemed to have permeated all education policies formulated in postcolonial Africa.

Once a development plan or white paper had been adopted by legislature, it served as the basis for education policy implementation.

Implementation, which forms an important focus of the study, is the responsibility of the ministries of education. Coming to terms with the exact meaning of implementation and how to measure it may be a complex and tedious exercise as Graig (1990) and Van Zyl (1990) clearly indicate. This is mainly due to the fact that one is not dealing with an either or situation, but rather with a continuum of degrees of implementation and even overimplementation.

Implementation is not a simple matter of changing existing legislation. It is a combination of technical and administrative processes that must be put in place. It concerns the deployment of resources and expertise. Various factors operating within the administrative structures of government may promote or retard implementation. These include the availability of resources and expertise, the feasibility of the policy, the goodwill of the bureaucrats responsible for implementation and the acceptance of the policy by the larger community.

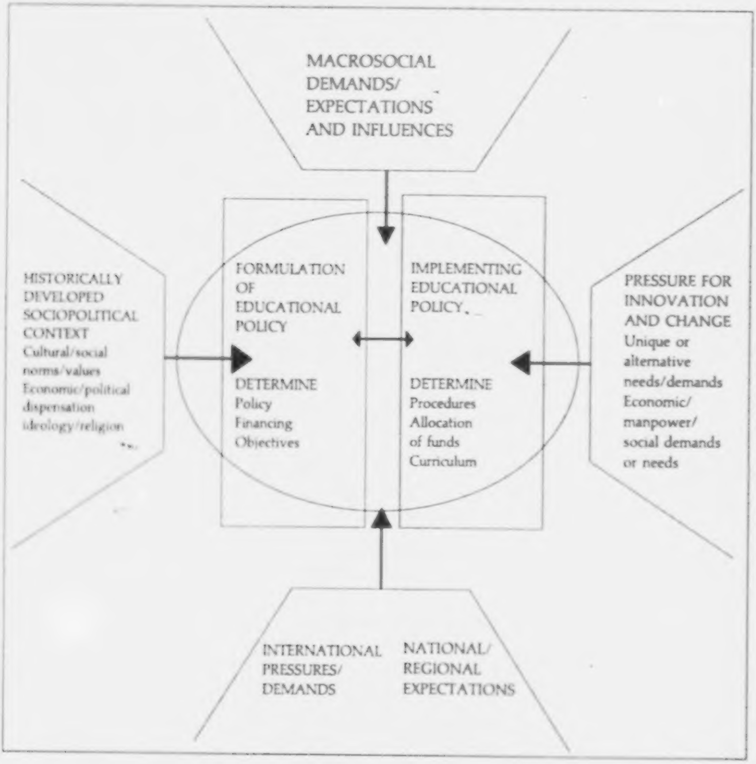
The impact of the policy on the education system may be immediate (such as in the case of the change to the 8-4-4 system in Kenya and the expansion of the education system in Zimbabwe - see Chapter 2) or prolonged. In the latter case, the lack of visible impact may result in the appointment of evaluation teams to study the education system. (See Kenya, Tanzania and Botswana.) Such an *evaluation* could contribute to renewed policy *reformulation*.

Ideally there should be a close relationship between *implementation, impact, evaluation (feedback) and reformulation*. During the process of implementation, specific obstacles may be encountered (such as pressure or resistance from receivers of the service or lack of/limited resources) that will have a direct impact on the implementation. The feedback received may necessitate the reformulation of goals. It may therefore be more logical to look at implementation in terms of degrees of implementation.

Two possible models could be employed to evaluate the degree to which implementation of a policy has succeeded, namely the research, development and diffusion model and the process model. (Fullan, Pomfret, 1977.) The first assumes that policy embodies clear and consistent objectives, that administration is neutral, benign and well-informed and that implementation is a separate issue that can be studied on its own. The process model focuses on the interaction of competing interests that transform policies in the course of their implementation.

In this study the process or interactional approach was favoured as it seems to highlight the multiplicity of factors impacting on education policy and implementation best. Figure 1.2 provides a graphical illustration of the factors impacting on education policy formulation and implementation.

FIGURE 1.2
FACTORS IMPACTING ON EDUCATIONAL POLICY FORMULATION AND IMPLEMENTATION


MACROSOCIAL DEMANDS/ EXPECTATIONS AND INFLUENCES
HISTORICALLY DEVELOPED SOCIOPOLITICAL CONTEXT
Cultural/social norms/values
Economic/political dispensation
ideology/religion
FORMULATION OF EDUCATIONAL POLICY
DETERMINE
Policy
Financing
Objectives
IMPLEMENTING EDUCATIONAL POLICY
DETERMINE
Procedures
Allocation of funds
Curriculum
PRESSURE FOR INNOVATION AND CHANGE
Unique or alternative needs/demands
Economic/ manpower/ social demands or needs
INTERNATIONAL PRESSURES/ DEMANDS
NATIONAL/ REGIONAL EXPECTATIONS

Education is a subsystem within the larger state and political dispensation. This includes the government of the day. Such a government will, preferably in consultation with its constituency, take decisions concerning education. In taking such decisions it will take its own political agenda as well as certain historical, sociocultural, religious and economic factors into consideration. The state, however, cannot operate in isolation from world influences and megatrends which will have to be taken into consideration in its policy formulation on education. Decisions taken by the government will be reflected in the policy developed, the finances funnelled into education and the objectives set for the education system.

The implementation of such a policy will be the responsibility of the administrative structures created for that purpose. In implementing the policy the implementer must also take socio-economic factors, demands and expectations into consideration. This will be reflected in the procedures developed and the allocation of funds as well as in the development of the curriculum. The interaction and the mechanicisms regulating this interaction between policy formulators and implementers vary from country to country.

This is partly the reason for it being so difficult to determine why policies have not been implemented to the full.

1.3.3 Donor aid[4]

Policies on donor aid vary and donor aid may take various forms. Generally speaking, there are three broad types of donor aid. (DAETF, 1993.) Firstly there are the traditional projects for which investments are appraised in detail and expenditure clearly specified. Secondly, there are loans and grants, under which the terms of agreement are more loosely defined and more flexible. Thirdly, some donors provide general budgetary or balance of payment financing as part of an overall package of macro-economic reforms.

The earliest aid provided often took the form of general scholarship programmes to newly independent countries. By 1986 Canada was supporting the largest number of students of any non-colonial donor country. (Mundy, 1994.) Initially, aid to Africa took the form of soft aid (technical advice, rendering of expertise and training). During the sixties this changed to aid in the form of funding for infrastructural projects and public utilities, food aid and lines of credit.

(1) Donor aid policies for aid to education

From the outset education was viewed as one of the major areas for support and funding. During the seventies, the importance of this sector seemed to diminish, but gained in importance in the eighties with the international community re-emphasizing the potential benefit of human resource development for sustainable economic growth.

Obviously, donor aid policy is very country or agency specific: it is determined by the own interest and agenda of the donor country or agency. There seems to be little doubt that UNESCO, the World Bank, and other multilateral and bilateral agencies have profoundly shaped educational development planning in developing countries. They have laid down conditions under which aid was given, they have provided foreign consultants and have persuaded governments to pursue specific policies. (King, 1993; Watson, 1994.) This is well illustrated by the shifts in concentration as discussed earlier. The result of this was that many African countries, like Kenya, were forced to divert funds from primary education to technical and vocational education. (Sifuna, 1992.)

Aid in general, and aid for education in particular, has always been controversial. There is an extensive body of literature which is highly critical of aid. Some development economists have argued that aid is inimical to economic development in Third World Countries. (See Hopkin, 1994.)

JAPAN INTERNATIONAL CO-OPERATION AGENCY

From 1953 to 1966, Japan borrowed US$860 million for development programmes in Japan. During the sixties it became a recipient of aid as well as a donor aid country. Over time it gradually increased its position as a donor aid country and in 1989 the JICA became the world's largest donor aid agency when it allocated US$8,96 billion (or 0,32 % of its GNP) to international aid. By then, the 18 top DACs were contributing 91 % of all donor aid.

Japan's overseas development aid (ODA) consists of bilateral grants, bilateral loans and financial subscriptions to multi-lateral organisations. Grant aid was disbursed to health, education and disaster relief. All developing countries are classified by Japan in order of priority. High priority countries in Africa include Kenya, Tanzania, Zambia, Ghana and Nigeria. In 1988, US$883,93 million was disbursed to African countries. Of this amount, 9,5 % took the form of grant aid and 62,5 % technical assistance. The main objective of aid to Africa is to increase food production and to meet the basic needs of people.

The technical assistance to countries included in this study in 1989 is reflected in the following table.

TECHNICAL ASSISTANCE	KENYA	TANZANIA	ZAMBIA
Number of people trained in Japan	159	108	52
Experts sent to Africa	67	11	27
Equipment provided		1	
Projects started			1
Grants allocated			2

Mosley (1986) looked at cases for and against aid and came to the conclusion that, on balance, the effects of aid have been positive. The fact of the matter is that external donor agencies play a significant, sometimes dominant, role in the funding and directing of educational development. This presents a unique challenge to donors and recipients to ensure that learners benefit optimally from funds invested.

Given the high level of donor involvement, donor aid cannot be divorced from policy implementation in Africa. Graig (1990) found that of the 145 educational policies reviewed, only 13 were actually implemented. This

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raises the question of whether donor involvement hindered or supported educational policy implementation.

1.3.4 Quality of education

From the study it became clear that one of the main concerns in education is the deterioration of the quality of education. Quality is a term frequently used, but seldom defined. (See Watson 1994; Galabawa, 1990.) It therefore seems appropriate to make a few general comments in this regard.

An intuitive definition of quality education or effective schooling is that schools or educational institutions produce "good" or "acceptable" results whether in the areas of academic, cultural or sport performance. This implies an emphasis on the results of education. Mortimore *et al.* (as quoted by Scheerens, 1992:59) lists 12 key aspects of school effectiveness.

In analyzing the concept, Van Zyl and Nieuwenhuis (1994) indicate that the context within which a school operates will have a direct influence on the effectiveness of the school. Four sets of contextual factors were identified (political/policy, social/cultural, economic and professional/technological). These factors impact on the inputs (providing equipment, staff and infrastructure) to the school, the processes in the school and the results, all of which have a bearing on the effectiveness of schooling or quality of education.

Although this theoretical framework does offer insight into what quality education is, it still does not offer a practical approach that can be implemented in a study of this nature. It was therefore decided to look at certain educational indicators as measures of a shift in the quality of education. Three specific indicators were considered:

- An increase in the level of training of the teaching corps

- An improvement in the physical infrastructure available (classrooms, desks, textbooks)
- An increase in performance levels of pupils at specific external examination points in the system

These indicators are not comprehensive and are more geared towards quantitative aspects than to the qualitative dimensions which also affect the quality of education. A poorly constructed curriculum will inevitably affect the quality of the education and it will not necessarily mean that the quality of the education has improved if an improvement in the results of the system can be demonstrated. At the same time, a well constructed and relevant curriculum is no guarantee of improved quality in education. This depends very much on interactional factors which cannot be determined in a study of this nature.

ENDNOTES

1 The journey from South Africa to Kenya, through all the countries studied, was undertaken by road. This afforded the researcher the opportunity to meet with people in the rural parts of the countries and to get a feeling for the problems experienced outside the nucleus of the education head office.

2 A widely accepted definition of "policy" is that it is a plan or general course of action adopted by a government. It follows that educational policy is a plan devised to serve a specific purpose. In the African context educational policy may be contained in acts, white papers on education, development plans or in national commission reports.

3 The idea of "concentration" of interest if preferred to "focus" to emphasize the fact that both policy formulation and the allocation of funds were concentrated on the identified priority.

4 For the purposes of the study, donor aid is described as all kinds of assistance, whether financial or in kind, that flow to a country. It includes concessional loans.

CHAPTER 2

EDUCATIONAL DEVELOPMENT IN POSTCOLONIAL AFRICA[5]

2.1 INTRODUCTION

The development of education in postcolonial Africa should be seen against the background of a number of megatrends that gave direction to the development of education in the different countries. Two of these trends that will receive specific attention were the call for educational expansion of the early sixties and the move towards the vocationalization of education in the seventies and eighties. Both of these were initiated at international and African forums.

2.2 EXPANSION OF EDUCATION

Two important international events of the early sixties had a great influence on the development of education in the initial postcolonial era. These were the United Nations First Development Decade (1961-1971), which gave priority to the expansion of secondary and tertiary education, and the Conference of African States on the Development of Education in Africa (1961) which provided a forum at which African states could decide on their priorities in education to promote economic and social development. The Conference assigned the greatest urgency to secondary and post-secondary education, stating that this must precede the goal of universal primary education (UPE).

The importance of educational expansion was re-emphasized by the All Africa States Conference held in Addis Ababa in 1967. The Conference also acknowledged the importance of primary education and African countries resolved to provide

- free universal primary education (UPE) by 1980;
- secondary education to at least 30 % of those pupils who had successfully completed primary education;
- higher education to at least 20 % of those candidates who had successfully completed secondary education; and to aim at
- improving the quality of education at all levels of the education system.

In all the countries surveyed the major, but often elusive, aims were universal basic education and expansion at higher levels of the education system. In general all the countries started off with inadequate and poorly developed education systems that had previously been in the hands of missionaries and accessible to a small percentage of the population only. The expenditure on education, as could be expected, was high during these initial years and the results quite remarkable. During the sixties and the seventies most of the expansion in education was financed by increased public expenditure.

> *The lack of development in Africa prior to its independence could be attributed to two factors.*
>
> *Firstly, the colonialization of Africa followed the industrial revolution in Britain and Europe. Early colonial policy was based on the idea that colonies should provide the raw materials for the factories of Europe.*

> *The establishment of industries in colonies was therefore not promoted as these would have created competition for the export markets of Europe.*
>
> *Secondly, many of the so-called colonies had "protectorate" status. This implied that the colonial power took responsibility for the defence and foreign policy of the protectorate, but did not see itself as responsible for the physical development of the protectorate.*

The proportion of the GNP devoted to education in developing countries rose on average from 2,3 % in 1960 to 4,5 % in 1984 and the proportion of the national budget from 11,7 % to 16,1 % in 1984. (World Bank, 1990)

The expansion of the education systems of the countries studied is indicated in Tables 2.1 (p. 20), 2.2 (p. 21) and 2.3[6] (p. 21). From the first two tables it may be deduced that, with the exception of Malawi, universal primary education was achieved in all the countries listed by 1983. This is not true. The data reflected in the tables include all children attending primary school as a percentage of the total age group that should be in school. Owing to the large number of overaged children in the schools, the picture is distorted. From the studies of individual countries it became clear that the actual percentages varied from as low as 54 % to approximately 98 %. This means that the aim of universal primary education (UPE), had not been achieved by 1983 excepting in Swaziland and Botswana. Colclough (1994) maintains that Africa remains the most undereducated continent in the world with almost half the children of primary school age out of school - the majority of these being girls.

An important trend to be noted in Tables 2.1 and 2.2 is that enrolments generally declined during the eighties. In analyzing this trend, Colclough (1994) came to the conclusion that this was mainly the result of the economic recession and general economic decline.

A detailed multivariate regression analysis undertaken by Colclough (1994) also revealed that low primary school enrolment ratios correlated with low per capita incomes, low public expenditure on education, high unit costs of education, low demand for schooling, and underenrolment of girls. If schooling for all in sub-Saharan Africa is to be achieved by 2005, enrolments at primary school will have to increase by 150 %. (*ibid*) The total additional recurrent costs for achieving UPE in sub-Saharan Africa by the end of the century will amount to some US$46 billion (1986 prices).

Contrary to Colclough, the trends noted in this study suggest that the decline in primary school enrolment could also be attributed to a shift in concentration that started in the late seventies and ran into the eighties. This shift resulted in scarce resources being channelled into technical and vocational education as a new avenue of investment in education.

TABLE 2.1
GROWTH IN PRIMARY SCHOOL ENROLMENTS IN THOUSANDS

COUNTRY	1960	1970	1980	1983
Tanzania	455 (24)[7]	856 (34)	3 368 (93)	3 553 (87)
Kenya	781 (47)	1 428 (58)	3 927 (104)[8]	4 324 (100)
Zambia	288 (51)	695 (90)	1 042 (98)	1 194 (100)
Lesotho	136 (92)	183 (87)	245 (102)	278 (110)
Zimbabwe	484 (74)	736 (74)	1 235 (88)	2 131 (131)
Swaziland	34 (57)	69 (87)	112 (106)	130 (111)
Botswana	36 (39)	83 (65)	172 (91)	198 (96)
Malawi	285 (38)	363 (36)	810 (61)	847 (58)

Source: World Bank Policy Study, 1990

TABLE 2.2
GROWTH IN SECONDARY SCHOOL ENROLMENTS IN THOUSANDS

COUNTRY	1960	1970	1980	1983
Tanzania	22 (2)[9]	45 (3)	79 (3)	82 (3)
Kenya	26 (2)	136 (9)	428 (18)[10]	517 (19)
Zambia	5 (2)	56 (13)	102 (17)	115 (17)
Lesotho	3 (3)	7 (7)	25 (17)	29 (19)
Zimbabwe	28 (6)	50 (7)	75 (8)	416 (39)
Swaziland	2 (5)	8 (18)	24 (39)	29 (43)
Botswana	1 (1)	5 (7)	21 (19)	25 (21)
Malawi	3 (1)	12 (2)	20 (4)	24 (4)

Source: World Bank Policy Study, 1990.

TABLE 2.3
PUPIL:TEACHER RATIOS

COUNTRY	PRIMARY				SECONDARY			
	1960	1975	1980	1983	1960	1975	1980	1983
Tanzania	41	54	42	42	18	20	-	20
Kenya	34	33	38	37	21	25	25	25
Zambia	47	48	49	46	-	-	21	24
Lesotho	46	53	48	52	22	22	-	19
Zimbabwe	40	40	44	40	-	18	20	40
Swaziland	40	38	34	33	17	21	17	18
Botswana	36	33	32	31	15	17	18	16
Malawi	43	61	65	58	16	18	21	19

Source: World Bank Policy Study, 1990.

From Tables 2.1, 2.2 and 2.3 it is clear that

- primary school enrolment increases were not only significant in terms of an increase in numbers, but also in terms of the percentage gain as a total of the age group concerned.

- quantitative growth was constant over the time period for all the countries studied (similar trends were found in those countries not included in the study).
- growth at secondary school level was less dramatic than primary school growth and reflects a problem of progression in the school system. Zimbabwe and Swaziland seem to be exceptions.
- as far as teacher:pupil ratios are concerned, secondary school ratios are significantly lower than those of primary schools.
- in most cases the growth in pupil enrolments was not met with a corresponding lowering in teacher:pupil ratios. In other words, ministries of education could not kept abreast with the demand for trained teachers. Research showed that these ministries had to revert to the appointment of untrained or less qualified staff to ease the pressure of large classes on the teaching corps.

2.3 PROVISION OF TECHNICAL AND VOCATIONAL EDUCATION AND TRAINING (TVET)

The provision of technical and vocational education by the state remains a controversial issue. (Hinchliffe, 1988) On the one hand, staunch critics such as Pscacharopoulos (1985), Lauglo (1989), Kerre (1986) and Lauglo and Lillis (1988) point out the general failure of vocational education to fulfil its aims.

> *The Conference of African Minsters of Education held in Lagos (1976). adopted the following major policy: "African states should provide a new form of education so as to establish close ties between school and work: such an education based on work and with work in mind should break down the barriers of prejudice which exist between manual and intellectual labour, between theory and practice and between town and country ... and therefore productive practical work should generally be introduced in schools, offering technical and vocational courses whether at primary, secondary or higher level."*
> *(NEIDA, 1982:9)*

On the other hand, there are those who claim that in an increasingly competitive and knowledge-based global economy, TVET can form an important part of a country's development strategy. (Adams, Middleton and Ziderman, 1992)

The World Bank's own findings on countries' investment in TVET show mixed results. (See World Bank, 1992.) In some countries the majority of TVET graduates find jobs in which their acquired skills are utilized. This is not the case in other countries. It is therefore important to understand the limitations and potential of TVET and to assign proper roles to public education and the role of the private sector in providing training.

Mudariki and Weeks (1993) summarize the research findings reported in the literature on TVET as follows:

- Governments expected TVET to achieve very difficult goals, namely to create jobs and solve the problem of unemployment.
- The social and economic context in which TVET operates is neglected.
- TVET is often promoted in the absence of a total strategy for development.
- TVET is generally donor funded and as a result there is an absence of homegrown ideas
- Vocational education is perceived as being of low status.
- Most developing countries cannot afford the costs of vocationalization.
- Studies reveal that employers in general are not concerned with prior vocational training, but look for success in English, Mathematics and Science.

According to the World Bank's Policy Paper on TVET (1992) the key is to link TVET to the demand for skills. Pre-employment training can yield good returns when there are jobs for graduates, *that is, when the training is driven by demand.* Asian countries seem to provide a good example of the success of implementing TVET based on demand. Jon Quah (1993) cites four aspects of the successful implementation of TVET by Japan, Singapore, South Korea and Taiwan:

- They invested heavily in human resources *by making formal basic education for their people a top development priority.*
- They devoted considerable resources to the *continual upgrading of their workforce* (Japan's per capita expenditure on formal off-the-job training is four times that of the USA).
- They have a close link between their *human resources development strategies and economic development policies.*
- They realise the importance of attending to the utilization as well as the development of human resources.

From the Asian experience it is clear that the mere provision of TVET cannot create jobs. Job creation requires sound macro-economic planning and appropriate consumer and employer incentives. TVET is especially weak at solving social problems unrelated to existing or anticipated demands for skills, *that is, where TVET is supply driven.* (Adams, Middleton, and Ziderman, 1992) These facts are particularly relevant to Africa where many people work outside the formal sector while many educational systems still provide a formal education leading to tertiary education. (Muskin, 1993) Preparing students for university or the formal economic sector, as is the case with many education systems in Africa, seems to be misdirected if the majority of them leave school after completing their primary education.

In identifying priorities for a public education policy aimed at improving the productivity and flexibility of the workforce, the World Bank (1992) states, as its first priority, the strengthening of primary and general secondary education - especially in Science, Mathematics and languages. It also claims that vocational education is more effective when trainees have strong literacy, numeracy and problem-solving skills. Muskin (1993) adds to this the need for entrepreneurial and innovative education in poor and developing countries that lack capital and resources: "Africa ... needs individuals who can think creatively and act independently more than a populace expecting to march obediently along the school to civil service path." (Muskin, 1993: 3)

In its policy document the World Bank (1990) stated that training should serve both school-leavers and those who have had no exposure to formal schooling, and it should ensure that individuals acquire the necessary job-related skills and renew these skills during their working lifetime. Vocation specific training is regarded as essential for Africa's development. "*The question is not whether to train, but when, where, how to do it and whose responsibility is it.*" (World Bank, 1990: 99) It argued that formal schools are neither the only, nor the best place to train students in most specific vocational skills. The World Bank claimed that vocational training is best done after initial employment is secured. The problem for Africa is that this is not a viable solution because of the high levels of unemployment and the underdeveloped nature of the industrial sector.

As far as training for job-specific skills is concerned, a substantial body of research has found vocational schooling to be less cost effective than on-the-job training.

It is therefore often claimed that the returns on vocational education do not justify the extra expense associated with it, unless there is a close match between training and occupational demand. (Adams, Middleton, Ziderman, 1992) This does not imply that there should not be public intervention in the provision of education, but that the type of intervention should vary and that there would be a continuing need for the government to provide for financing and delivering TVET.

In the countries studied, the vocationalization of education took various forms (See Education for Self-Reliance in Tanzania, the Harambee Technical Institutes and Technical Secondary Schools in Kenya, the Brigades and Trade Training Schools in Botswana, the Technical Institutes in Zambia). Yet no evidence could be found that these approaches yielded the necessary results. The main aim of these approaches was to alleviate the unemployment problems in the countries, to stem the tide of urbanization, and to stimulate self-employment. Measured against these criteria, technical and vocational education failed dismally. Added constraints to technical and vocational education were the fact that it is more expensive than academic education; it requires specific categories of skilled people and the technology used dates quickly as industry continually modernizes its process.

The disillusionment of the eighties with the potential of TVET to solve the ills of society led to a rethinking of education and a renewed commitment to the importance of universal basic education. This commitment was reaffirmed with the Jomtien Conference on Education for All (1990) and may herald a new shift of emphasis in education.

2.4 PROVISION OF EDUCATION IN THE COUNTRIES STUDIED

The fact that certain megatrends influenced the development of education in Africa does not mean that the countries in the study developed their education systems along similar lines. Nor does it imply that governments set about educational reform in the same way. In the light of these observations, it is important to give a brief overview of some of the major trends in educational development in the countries studied. These are based on the country-specific reports.

2.4.1 Education for Kagisano: the case of Botswana

(1) Background

Botswana is a liberal democracy and all elections since independence on 30 September 1966 have been contested by opposing parties. Botswana covers a vast area of 582 000 km^2 and lies at the centre of the vast interior basin of the Kgalagadi Desert. In terms of population, Botswana is a relatively small country with its population of 1,3 million consisting of more than 80 % Batswana. The majority of the population is concentrated on 20 % of the land in an eastern band along the Limpopo and Shashe Rivers. The population shows a typical Third World age distribution with 48,1 % of the population being younger than 15 years. In 1991 half the labour force was in formal sector jobs, while the other half was in the informal sector, traditional agriculture or unemployed.

In 1992 Botswana's GNP, measured at average 1990-92 prices, was US$3,797 million (equivalent to US$2 790 per head). (World Yearbook, 1994) During 1985-92 it was estimated that the GNP per head increased at an average of 8,1 % per annum, making it one of the countries in Africa with the highest economic growth. Mining formed the backbone of the growth, while agricultural activity decreased mainly because of the droughts experienced during the eighties. In 1992/93 the share of the national budget allocated to education was 22,6 % of the recurrent budget and 8,7 % of the development budget.

The development of the education system in Botswana was favoured by both the stable political environment and the high economic growth. Although Botswana inherited a poorly developed education system, it succeeded in greatly expanding the system in terms of numbers and educational opportunities. Since 1977 education development has been directed by the Report of the National Commission on Education[11] entitled *Education for Kagisano*. This report was accepted as education policy by the government in 1977 and laid down the following principles for the education system:

- Education had to be directed at the promotion of democracy.
- Education had to be directed at the development of the population.
- Education had to promote self-reliance.
- Education had to be aimed at the promotion of national unity.
- Education had to promote Kagisano.[12]

(2) Critical analysis of the education system of Botswana

Since 1977, Botswana has succeeded in putting in place an education structure that could achieve the educational goals set. It is responsive enough to serve as a springboard for future development and to meet the demands of the democratization and decentralization of the system. Many of the problems experienced in education in Botswana may be associated with the typical problems of a small country. From an overall management perspective, there is not a critical mass of qualified technical and administrative staff to perform all the functions to be executed. When one or two senior officers are promoted, it has a domino effect through the system. At middle management level, many officers are expatriates appointed on contract. This is problematic as continuity is required at this crucial management level.

In analyzing the education system a number of major challenges were identified:

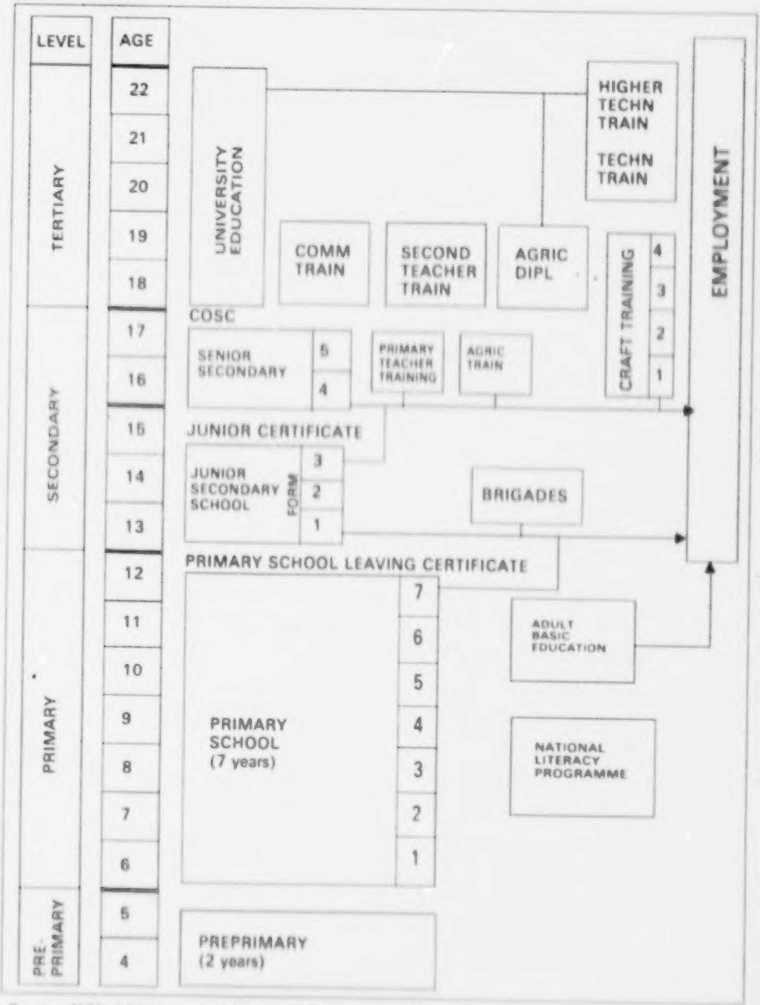
- The National Policy on Education of 1977 adopted a change in the structure of the education system from 7 years primary, 3 years junior secondary and 2 years senior secondary, to a 6-3-3 system. As a transitional measure, the government adopted a 7-2-3 structure. It was envisaged that by 1995 about 90 % of primary school children would enter junior secondary schools, by which time it would be possible to implement the 6-3-3 structure. This has not materialised. The fact that reducing primary school education by one year would be disadvantageous to many children and organisationally difficult to implement has convinced the government to re-introduce a 7-3-2 system. (Republic of Botswana, 1994) (See Figure 2.1, p. 30.)

- Presently preprimary education is provided mainly by private individuals and organizations through a daycare programme. Access is limited to about 7 % of 3 to 6 year-olds. The curriculum is not standardized, teachers are trained outside formal institutions and preprimary schools are not supported by the ministry of education. Although the government recognises the importance of preprimary education, it does not see its way clear to providing the education.

- Formal education in Botswana has been characterized by a massive increase in enrolments. Between 1979 and 1991 enrolments in primary schools rose by 91 %, in secondary schools by 342 % and at the university by 315 %. The massive expansion of the education system has not been adequately matched by a qualitative improvement in educational standards. Evidence produced by the NCE (1993) points to the fact that academic achievement of Standard 7 pupils (Primary School Leaving Certificate) is declining. This is also evident in the decline in performance at Junior Certificate (JC) and Cambridge Overseas School Certificate (COSC) levels. Related to this is the fact that up to 1993 Botswana had been unable to localize senior secondary education and the COSC.

- According to the 1991 census, about 17 % of primary school age children were not enrolled in formal education.[13] This implied that the aim of universal primary education, set as a major goal in 1977, had not been achieved. As far as the provision of primary education is concerned, it is the policy of the government to provide educational opportunities. Education is not compulsory, but it is viewed as the responsibility of the parents to ensure that the children make use of the opportunities provided.

FIGURE 2.1
STRUCTURE OF THE EDUCATION SYSTEM OF BOTSWANA


LEVEL
AGE
TERTIARY
SECONDARY
PRIMARY
PRE-PRIMARY
22
21
20
19
18
17
16
15
14
13
12
11
10
9
8
7
6
5
4
UNIVERSITY EDUCATION
HIGHER TECHN TRAIN
TECHN TRAIN
EMPLOYMENT
COMM TRAIN
SECOND TEACHER TRAIN
AGRIC DIPL
CRAFT TRAINING
4
3
2
1
COSC
SENIOR SECONDARY
5
4
PRIMARY TEACHER TRAINING
AGRIC TRAIN
JUNIOR CERTIFICATE
JUNIOR SECONDARY SCHOOL
FORM
3
2
1
BRIGADES
PRIMARY SCHOOL LEAVING CERTIFICATE
PRIMARY SCHOOL (7 years)
7
6
5
4
3
2
1
ADULT BASIC EDUCATION
NATIONAL LITERACY PROGRAMME
PREPRIMARY (2 years)

Source: NCE, 1993 and the Ministry of Education, 1991

- One of the main concerns within the education system is the progression from primary to secondary school. In a report on the Vocational Education and Training Development Plan (1992) it was claimed that only 25,2 % of the pupils completing junior secondary education in 1987 gained admission to senior secondary schools, 3,3 % joined the Brigades, 3,3 % went on with vocational education, and 5,5 % took up employment in the formal and informal sectors. This implied that 60 % were left without further study opportunities or were unemployed. According to the NCE (1993) this indicates both a problem of access and equity.[14] In rural areas the access and progression to higher levels of education were much lower than in urban complexes, such as Gaborone.
- Providing an adequate and efficient mix of academic and vocationally oriented education remains an issue. In its response to the report and recommendations of the NCE the government has stated its policy concerning TVET as follows: "An efficient and effective training system is crucial in a country's economic development and therefore it is necessary to focus attention on the training system distinct from general education and to give it more priority". (Republic of Botswana, No 2, 1994: 9)

2.4.2 Provision of education in Lesotho

(1) Background

The development of education in Lesotho since its independence should be seen against the political instability of the seventies and eighties, the continued weak performance of the economy, escalating overseas debts and a drop in agricultural production and output. These factors impacted negatively on the realization of the targets set by the national development programmes of the government.

According to 1991 World Bank estimates, Lesotho's GNP, measured at average 1989-91 prices, was US$1,053 million (equivalent to $580 per head). Although the GNP increased (in real terms) at an average rate of 2,7 %, the average annual population growth was also 2,7 %. At the present rate, the population will double in 25 years. This will place an enormous burden on the fragile environment and the country in terms of providing food, employment and education. Lesotho is already faced with the problem of importing food to provide for its needs.

At present, 15 000 to 20 000 people are added to the labour force each year. Simultaneously, the number of migrant workers to South Africa is diminishing.

The Lesotho economy cannot absorb such numbers of new entrants to the labour market. The balance of payments position of Lesotho[15] exemplifies its dependency on South Africa. The deficit is financed by remittances from migrant labour (according to the Bureau of Statistics in Maseru (1991) 38 % of the total male labour force was employed in South Africa), customs union revenue and donor aid. (See Third Development Plan 1979/80-1984/85.) Lesotho's dependency on the South African economy places it at a further disadvantage as fluctuations in the South African economy directly impact on Lesotho. During 1990-91 more than 10 000 Basotho mine workers were retrenched as a result of the slump in the international gold price.

A three-year economic reform programme (1991-1994), supported by the IMF and other donors, is aimed at increasing domestic investment, diversifying manufacturing, production and exports, restructuring some of the state enterprises, and privatizing others, and at improving the balance of payments position of Lesotho. Until these aims have been achieved, Lesotho will remain dependent on donor funding to assist in the financing of its education system. This implies that any improvement in the educational system must be financed through loans and foreign aid.

(2) Critical analysis of the education system of Lesotho

At the time of the independence of Lesotho in 1966, education was inadequate in scope, quantity and quality. (Thelejani, 1990) Prior to its independence, formal education was mainly offered by missionaries[16] (95 % of all schools were controlled by missionaries). This was limited to primary education and only one institute of higher learning (the Roman Catholic University College). The Government of Lesotho is increasingly recognizing that, as the country's natural resources are limited, it must emphasize the development of its human resources as the key to sustainable development and long-term economic growth.

In the mid-1970's Lesotho began to pay serious attention to education: it gradually increased its political and financial commitment to education and explicitly recognized this sector's fundamental importance to the achievement of both economic and social goals. (Ministry of Education, 1990/91) The first comprehensive survey of the education system was launched in the early 1980's with a view to identifying clear objectives for sectoral development in relation to broader national development goals. As a result of the survey three overarching objectives with regard to education were formulated. (See *The Education System Survey: Report of the Task Force.*)

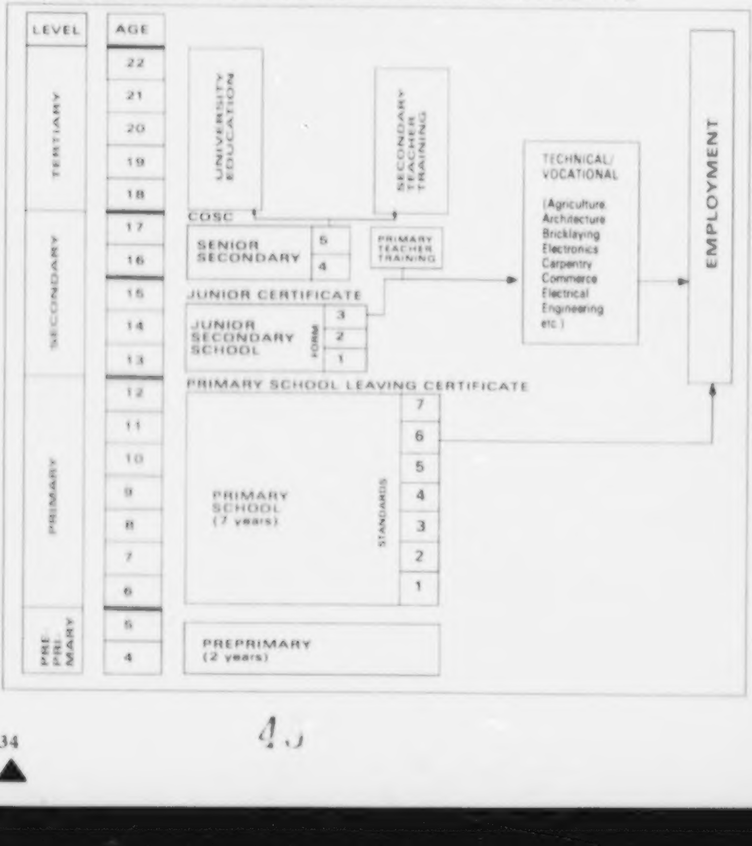
- To democratize access to education to the point where all Basótho children are assured of at least primary schooling or its equivalent;
- To ensure that educational programmes reflect Lesotho's development requirements, in particular with regard to the development of

problem-solving skills, scientific and technical abilities and socio-cultural values in conjunction with basic literacy and numeracy;

- To equip sufficient numbers of individuals with appropriate occupational, technical and managerial skills to facilitate the country's socio-economic development.

These goals and the extent to which they were implemented should be measured against the background of the education system which was subsequently developed. The education system of Lesotho is graphically illustrated in Figure 2.2.

FIGURE 2.2
EDUCATION AND TRAINING SYSTEM OF LESOTHO


LEVEL
AGE
TERTIARY
SECONDARY
PRIMARY
PRE-PRI-MARY
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21
20
19
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15
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13
12
11
10
9
8
7
6
5
4
UNIVERSITY EDUCATION
SECONDARY TEACHER TRAINING
COSC
SENIOR SECONDARY
5
4
PRIMARY TEACHER TRAINING
JUNIOR CERTIFICATE
JUNIOR SECONDARY SCHOOL
FORM
3
2
1
PRIMARY SCHOOL LEAVING CERTIFICATE
PRIMARY SCHOOL (7 years)
STANDARDS
7
6
5
4
3
2
1
PREPRIMARY (2 years)
TECHNICAL/ VOCATIONAL
(Agriculture Architecture Bricklaying Electronics Carpentry Commerce Electrical Engineering etc.)
EMPLOYMENT

Although the postindependence era in Lesotho witnessed a substantial growth in the education sector, a number of major challenges still confront the educational authorities.

- In 1991, more than 88 % of the 360 000 pupils in Lesotho were enrolled in the primary school system which was severely overcrowded and understaffed. The pupil:teacher ratio at primary school level in 1990 was 54,5:1. In terms of physical facilities, there were 3 552 classrooms and 840 church halls in 1990, yielding an overall pupil:classroom ratio of 67:1. Many children were still taught outside. Shortage of furniture was also a major problem and many children had to sit on the floor. Lesotho's harsh winters renders learning under these conditions very difficult. These factors were cited as some of the main reasons for the poor quality of education.
- Although primary schools were open to all, universal primary education had not been achieved by 1991.
- Twenty percent of all primary school teachers were unqualified, while a further 44 % were underqualified. Although there were a number of degree programmes geared towards producing large numbers of teachers, many teachers were lost to South Africa where higher salaries were paid. This brain drain resulted in a chronic shortage of teachers.
- Progression from primary to secondary education remains a major problem. Despite the growth in enrolment, in 1990 only 14 % of primary school pupils proceeded to secondary education.
- In recent years there seems to have been a steady decline in the quality of education. This is evident in the poor examination results, an increase in unruly student behaviour (frequent strikes), an increase in schoolgirl pregnancies and the high dropout rate. According to the Annual Report (1990/91: 27) this problem is worse at secondary

school level where only 59,1 % of students passed the JC Examination in 1989 and a mere 27,8 % of the students passed the COSC.

- Since independence it has been a government priority to see that education is relevant to the manpower needs of the country by producing sufficient numbers of people with appropriate occupational, technical and managerial skills to ensure the development of the modern sector of the economy. (Ministry of Education, 1992) During the 1990/91-1994/95 Development Plan period, it was envisaged that the quality and relevance of technical and vocational education would be improved through closer links with industry and employers, through promoting technical subjects at secondary school level and developing a national curriculum for post-secondary institutions. These goals have not been attained. Few postprimary school training opportunities exist for those who drop out of the system at primary school level (age 12 to 13). At the same time, the school system in Lesotho has failed to produce students with entrepreneurial skills. Despite the focus on the acquisition of practical skills, academic excellence is still regarded as the hallmark of an educated man in Lesotho.

It could be argued that the practical skills programmes were not suitable for a country like Lesotho as they did not take the critical elements of the society into consideration. Furthermore, traditionally many members of the unskilled labour force could find employment in the mines in South Africa. The South African economy could even absorb many of the skilled labour force. With the economic recession in South Africa this market no longer offered the same opportunities and many graduates are under- or unemployed. Whatever the reasons may be, the fact is that education in Lesotho has not succeeded in pushing Lesotho into the technological era as was envisaged at independence.

2.4.3 Focus on learning: the case of Zambia

(1) Background

Zambia lies on a gently undulating plateau of savanna country between 900 and 1 500 metres above sea level. It is covered by deciduous woods, grassy plains and marshland. It has adequate land, but only two thirds of that which is arable is used. Farmers can be divided into three groups: a few hundred expatriate farmers (mostly white) producing more than half of the total output; a small number of Zambian farmers using modern farming techniques; and the vast majority involved in subsistence farming and producing little more than they need. Agriculture is, however, not popular among young people. The majority look down on the manual work entailed in agriculture and aspire to white collar jobs. The estimated population of Zambia in 1991 was 8,023 million. (UN World Population Prospects, 1990) The population distribution shows a typical Third World age distribution with 49 % of the population being younger than 15 years.

Zambia gained its independence in 1964 and was declared a one-party state in 1972 under the leadership of Dr Kenneth Kaunda.[17] Constitutional changes were made which effectively eliminated all opposition. In the 1980s opposition to President Kaunda mounted as corruption and inefficiency within the government escalated. These tensions continued into the late eighties by which time it became clear that President Kaunda had no alternative but to introduce a multiparty democracy. Multiparty elections were held in 1991 and President Chiluba was elected with an overwhelming majority.

During the sixties, Zambia maintained a positive balance of payments based on the export of copper. With the drop in copper prices, the whole scenario changed and by 1991 Zambia had a budgetary deficit of K 30 000 million and the external public debt of US$7 279 million. In 1990, according to estimates by the World Bank, Zambia's GNP, measured at average 1988-90 prices, was US$3 394 million (equivalent to US$420 per head). (World Yearbook, 1994) During 1980-90, it was estimated that the GNP per head declined at an average of 2,9 % per year. The GDP increased, in real terms, by an annual 0,8 % in the 1980-91 period.

Since his election Chiluba has had to adopt stringent economic measures in an attempt to implement the structural adjustment programme of the IMF and to set Zambia on the road to economic recovery. These measures have meant increased hardship for the people and dissatisfaction with the government has mounted. Numerous reports of conspiracy against the government have been released. (See *Zambian Times* of 9-15 January 1995.)

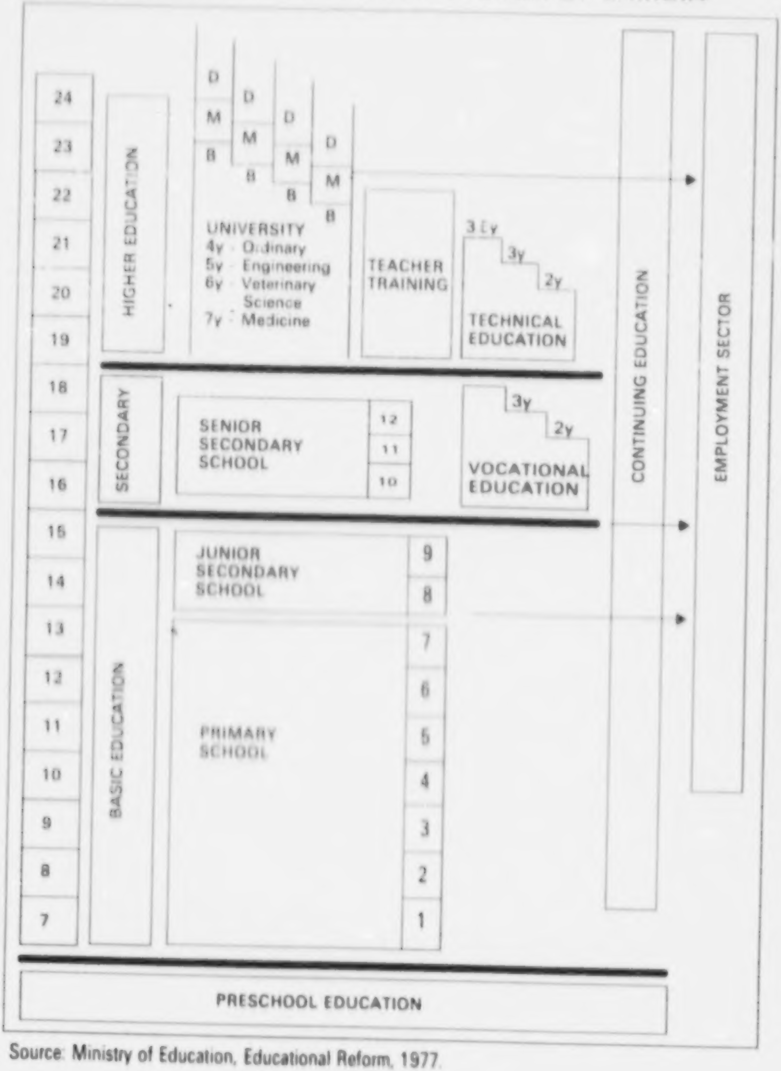
The political turmoil and poor economic position of Zambia deals education a double blow: firstly, it does not create an environment conducive to the implementation of much needed reform, and, secondly, it does not create a climate which will lure foreign donor aid.

(2) Critical analysis of the development of education in Zambia

When Zambia gained its independence in 1964 the general level of education of Africans in Zambia was exceptionally low - only a hundred held a university degree and less than 1 000 had received a secondary education. (See Republic of Zambia, 1965; Achola, 1990.) In the First National Development Plan (1965-69) the Zambian Government sought to change the pre-independence situation by a vast increase in resources for education. In line with the recommendations made in an UNESCO study, the government set as priorities the removal of segregated education, the expansion of primary education, the production of skilled workers, an increase in teacher education and the Africanization of the teaching force by reducing the number of expatriate teachers. In line with these aims, the sixties and seventies witnessed a dramatic expansion of the education system.

By 1977, it was felt that education should be reformed. In one of the major educational policy documents released since independence (i.e. the Educational Reform Document (1977)), it was proposed that educational reform should include changes in the structure, curriculum content, methods of teaching, teacher education, educational facilities and organization of the department. It moved away from the original aim of ten years of UBE to nine years of UBE, but retained ten years of UBE as the long-term aim. To date the interim structure recommended in the report is still in place (see Figure 2.3, p. 40) and the move to six years primary education has never taken place. Other aims of the reform were to improve the quality of education without sacrificing quantity and to move towards affording each child the opportunity of attending at least primary school. These goals were not achieved and although pupil numbers kept on rising, the decline in the quality of education continued mainly as a result of a lack of finances and constraints such as large classes, poorly furnished classrooms, a scarcity of textbooks and other essential items. Furthermore, the growth in pupil numbers at primary and at secondary school level met or exceeded the planned targets, but as a result of the high population growth rate, the aim of UBE could not be attained nor could the ideal of offering primary education to all children be met.

FIGURE 2.3
STRUCTURE OF THE EDUCATION SYSTEM OF ZAMBIA


24
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9
8
7
HIGHER EDUCATION
SECONDARY
BASIC EDUCATION
D
M
B
UNIVERSITY
4y - Ordinary
5y - Engineering
6y - Veterinary Science
7y - Medicine
TEACHER TRAINING
3.5y
3y
2y
TECHNICAL EDUCATION
SENIOR SECONDARY SCHOOL
12
11
10
3y
2y
VOCATIONAL EDUCATION
JUNIOR SECONDARY SCHOOL
9
8
PRIMARY SCHOOL
7
6
5
4
3
2
1
CONTINUING EDUCATION
EMPLOYMENT SECTOR
PRESCHOOL EDUCATION

Source: Ministry of Education, Educational Reform, 1977.

In 1991, a new policy for education called Focus on Learning was drafted and was officially recognised by the new government as the education policy in Zambia. *Focus on Learning* (1992: iv) states that the fundamental aim of the school system is "... to promote the integral, harmonious development of the physical, intellectual, affective, moral and spiritual endowments of all students so that they can develop into complete persons for their personal fulfilment and for the common good of the society of which they are members."

The main focus of the report is on primary education and it is recommended that the Ministry of Education should concentrate, in the first instance, on providing seven years of education for every child and on enhancing the quality of that education. The report retained the existing education structure.

The main achievement in the development of education in Zambia has been the massive expansion of the education system. Since independence, hundreds of schools have been built, the University of Zambia established, teacher training colleges expanded and trade training institutions created. The majority of these developments co-incided with the high economic growth of the sixties. Since then much has stagnated and the eighties saw these facilities deteriorating, pupil:staff ratios increasing and standards dropping.

In line with these trends, primary school enrolments expanded rapidly up to 1985 but thereafter the growth slowed down, falling considerably below the population growth rate. In 1990, approximately 190 000 children of primary school age could not be placed in schools, the infrastructure was rundown and in need of rehabilitation, there was a backlog of 400 000 desks and an overall severe shortage of books. Currently, the dropout rate from primary schools is very high, universal primary education is still beyond the reach of Zambia and expansion at higher levels has stagnated.

As far as secondary education was concerned, the situation was far worse than that of the primary school sector with very few pupils progressing from grade 7 to 8 and from grade 10 to 11.

Although Zambia can boast that it succeeded in the Zambianization of the formal employment sector, this sector cannot absorb the number of school leavers and graduates. This hikes the tide of the educated unemployed - a problem that needs urgent attention, but is not easy to solve. Vocationalization of education is seen as one possible solution. However, existing TVET institutions do not have the ability or resources to offer skills to the large number of unemployed adequately. Approximately 200 000 children leave school annually without any opportunities to acquire skills for a productive life. (Policy Document DTEVT, October 1994)

It is estimated that the number of youth with an incomplete school education totals 3,5 million. In 1995, only 1 750 of the 20 000 applicants with a Grade 12 certificate could be enrolled at trade training institutions. The need for more TVET centres aimed at engendering self-employment skills is clear and is the motivation behind the appointment of a task team by government and funded by Denmark and the Netherlands.

This task team drafted a new Technical Education and Vocational Education and Entrepreneurship Training policy encompassing all technical education and vocational training, including all levels of training. (Ministry for Science, Technology and Vocational Training, 1994a). The policy aims to balance the supply of skilled labour at all levels with the demands of the economy, to act as a vehicle to improve productivity and income generation and to help minimise inequalities. In recognition of the fact that 70 % of the labour force is in the informal sector, the policy also developed guidelines for promoting entrepreneurship training as part of all training. For the first time the government's responsibility towards early school-leavers, the unemployed and retrenched is acknowledged and these people are included in the target group.

Finally, an important challenge to education in Zambia is the decentralization of the education system. The aim is to retain the functions of policy, planning, curriculum development and certification at central level and to decentralize all other functions to provincial and district level. This implies the establishment of school management boards at school district level.

2.4.4 Education for self-reliance: the case of Tanzania

(1) Background

The United Republic of Tanzania consists of Tanganyika, on the African mainland, and the islands of Zanzibar and Pemba in the Indian Ocean. The climate varies with altitude, ranging from tropical in Zanzibar and on the coastal plain to semitemperate in the highlands. Savannah and bush cover more than half the country; desert and arid land account for the remainder, except for the lush coastal belt.

The colonial era in Tanganyika claimed to bring law and order, economic prosperity and education to a territory devastated by intertribal warfare and the depredations of the slave trade. The colonial era, contrary to the other case studies, was typified by an uncertain political development up to the time that Tanzania gained its independence on 9 December 1961. These developments placed Tanzania at the periphery of development as investment tended to favour Kenya. Little was done to provide educational opportunities for Africans with the result that at the time of Tanzania's independence only 16 691 pupils were enrolled in secondary schools. Few opportunities existed for higher education and those were outside Tanzania.

At independence in 1961, President Nyerere, who was highly effective as an independent policy-maker, declared his intention to establish a socialist state in Tanzania. Socialism was understood to include the development of both material resources and socialist institutions, socialist attitudes and a socialist way of life. (Buchert, 1994) In 1965 the Westminster-style pluralistic democracy was replaced by a one-party state. During the eighties, however, international pressure mounted for the introduction of a multiparty democracy in sub-Saharan African. This resulted in President Mwinyi (successor of Nyerere) establishing a presidential commission to investigate the possibility of introducing multiparty democracy. Changes to the constitution were effected in 1992 and the date for the first multiparty elections were set for 1995.

Although the initial years of independence saw a growth in the economy, there was an overall budget deficit from the early seventies onwards and this doubled by the 1980s. In 1989 Tanzania's external debt totalled US$6 459 million of which US$5 786 million was long term public debt. Debt servicing formed an important part of overall government expenditure. Many of the economic problems may be contributed to ineffective administration, corruption and the policy of socialism that hindered private sector development. By the 1990's it was generally accepted that Tanzania was one of the poorest regions in Africa. The World Bank's Poverty Profile (1994) claimed that approximately 50 % of the population (mainly rural) was officially considered to be poor, with 35 % belonging to the hard core of poverty.

The economy has improved since 1986, when the government adopted austerity measures recommended by the IMF (including the devaluation of the currency, stringent budgetary controls and the liberalization of the economy). Despite the recent marginal improvement in the economy, Tanzania is still heavily dependent on aid from the international donor community. At the time of the study, a high profile issue was the dismal record of tax collection in Tanzania, with donor aid countries threatening to withhold aid if the government did not improve its tax collection procedures.

The population of Tanzania totalled 25 million in 1992 and is expected to increase at between 2.7 and 3 % resulting in a population of 31.5 million by the turn of the century. (Report of Task Force, 1993) Mid-1991 estimates by the FAO (Production Yearbook) put the total workforce of Tanzania at 12.1 million of which 10 million were employed in agriculture, forestry, hunting and fishing. Manufacturing and industry are a relatively small employee sectors because of the low level of industrialization.

(2) Development of education since independence

Educational development in Tanzania since independence is divided into four phases:

- *The integration of education (1961-1967):* The first priority of the government on gaining independence was to integrate the colonial system of segregated education and to equalize educational opportunities through accelerated expansion of the primary and secondary school sector.
- *Education for self-reliance (1967-1974):* President Nyerere issued his statement on education for self-reliance in 1967. This became the basis of all major changes in education and was implemented through the Education Act of 1969.
- *Education for self-reliance (ESR)* stressed that education, as part of the society's structure, should promote a socialist transformation. (Buchert, 1994; Galabawa, 1990) The main objective of ESR was to promote mass education in order to improve production in and the productivity of the rural sector and to incorporate the broad

population in the policy-making process. The underlying rationale was both economic and political. Income-producing activities were to alleviate public expenditure on education by meeting 25 % of the recurrent cost of each school. This ideal was never met.

In implementing ESR a group of curriculum developers were required to review the curriculum and introduce changes necessary for the realization of ESR. Although a number of curricula were revised, the trend was to overload the curricula at all levels. By 1974, it was realised that many of the goals of ESR had not been achieved. Although substantial progress was made with new syllabi, many schools were not part of the economic system and could not demonstrate self-reliance through productive activities. Evaluations were still predominantly examination oriented and practical aspects were not effectively evaluated.

- *Universal Primary Education (1974-1980)*: *The Musoma Resolution* was issued in 1974 after the government had reviewed the achievements (or lack thereof) of ESR. *The Musoma Resolution* stated that free and compulsory universal primary education (UPE) had to be achieved by 1977; that secondary schools had to be expanded; that technical courses had to be introduced for those who did not proceed with secondary education; and that, in line with the ESR policy, the education system had to be restructured so that work would become part of education in all institutions.
- *Education for All (1980 onwards)*: In 1980 the Presidential Commission on Education was set up to plan the future of education. The basic concern of the commission was the quality of education, its cost and its training role at postprimary level. The recommendations made by the commission were never implemented and expenditure on education in the eighties declined from about 12 % of the recurrent

national budget in 1981 to 6 % in 1989. During the eighties the strategy of *Education for Self-Reliance* (though still officially recognised in all education acts and documents) was abandoned.

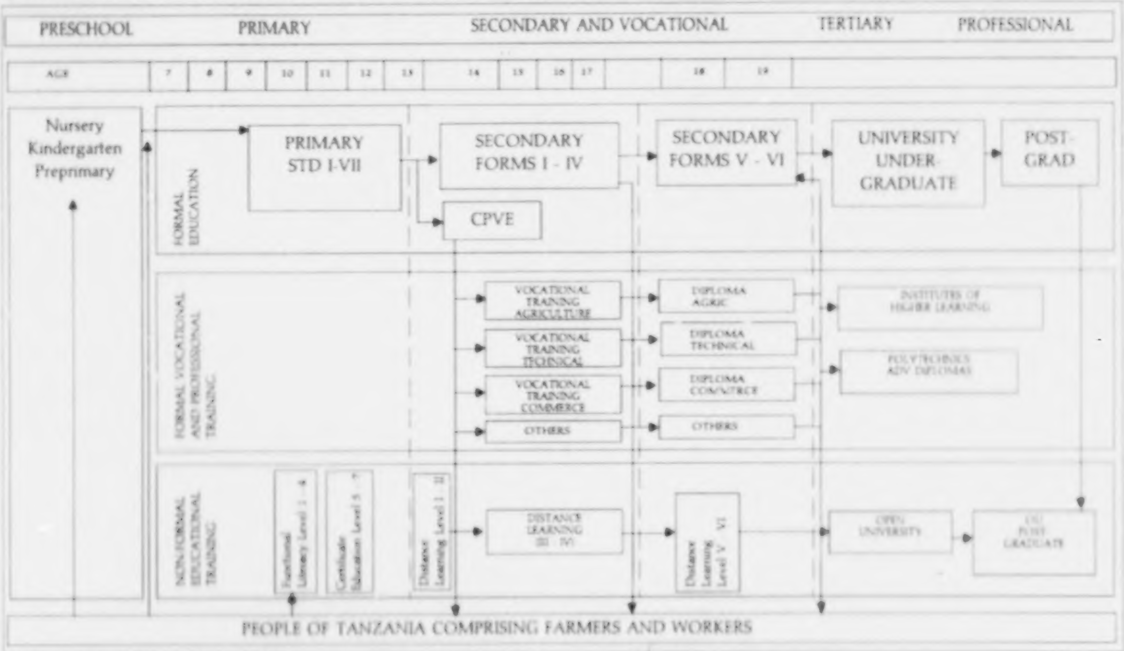
(3) Critical analysis of educational development in Tanzania

A look at the development of education in Tanzania since independence make it clear that the Tanzanian Government's goals in education have always been ambitious. The government's stated aims were to offer education at every level (preschool to tertiary). (See the structure of the education system in Figure 2.4, p. 48.) It proposed UPE, expansion of schools, and increasing enrolments at university level. These goals were not feasible within the fiscal and administrative realities. (Social Sector Review, 1993)

In its appraisal of the system the Task Force appointed by government in 1993 attributed some of the inability to achieve the set objectives to economic constraints, public sector management irregularities, inappropriate sectoral policies and ineffective planning and implementation. The Task Force (1993) also maintained that ESR and the *Musoma Resolution* involved unnecessary haste and did not allow for adequate time for reflection and rational decision making.

The ESR policy was mainly aimed at building a socialist society. By 1980, Tanzania still had a strong capitalist orientation in the informal and formal business sectors and it could be argued that the policy had failed. Galabawa (1990) pointed out that the presence of a capitalist orientation does not of necessity imply that education has failed to ensure that the goals of ESR were realised. The apparent failure of ESR was very much the result of pressures outside of education.

FIGURE 2.4
STRUCTURE OF EDUCATION AND TRAINING IN TANZANIA


PRESCHOOL
PRIMARY
SECONDARY AND VOCATIONAL
TERTIARY
PROFESSIONAL
AGE
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14
15
16
17
18
19
Nursery
Kindergarten
Preprimary
FORMAL EDUCATION
PRIMARY STD I-VII
SECONDARY FORMS I - IV
SECONDARY FORMS V - VI
UNIVERSITY UNDER-GRADUATE
POST-GRAD
CPVE
FORMAL VOCATIONAL AND PROFESSIONAL TRAINING
VOCATIONAL TRAINING AGRICULTURE
VOCATIONAL TRAINING TECHNICAL
VOCATIONAL TRAINING COMMERCE
OTHERS
DIPLOMA AGRIC
DIPLOMA TECHNICAL
DIPLOMA COMMERCE
OTHERS
INSTITUTES OF HIGHER LEARNING
POLYTECHNICS ADV DIPLOMAS
NON-FORMAL EDUCATIONAL TRAINING
Functional Literacy Level 1 - 4
Certificate Education Level 5 - 7
Distance Learning Level I - II
DISTANCE LEARNING III - IV
Distance Learning Level V - VI
OPEN UNIVERSITY
OU POST GRADUATE
PEOPLE OF TANZANIA COMPRISING FARMERS AND WORKERS

Source: Report of Task Force, 1993

Structural adjustment programmes in the economy were somewhat forced on all sub-Saharan African countries by the IMF while the pressure for a market economy and political pluralism was also mounting. Within the international arena the major Jomtien Conference on Education for All (1990) impacted on education thinking. These macro-external influences had major consequences for educational development in Tanzania. It set the scene for renewed thinking on education and a recommitment to education for all.

Galabawa (1990) also contends that educational indicators of a quantitative nature cannot reveal the more covert changes that had taken place in the society. The Task Force (1993) disagreed with this viewpoint and claimed that ESR had been implemented by employees fearful of losing their jobs. Thus there were exaggerated success stories concerning the implementation of ESR.

Whether the policy of ESR had failed or not, it is certain that major achievements had been accomplished. At the same time it is clear that certain major challenges still need to be addressed:

- On the quantitative side massive expansion of the education system was demonstrated: school enrolments at all levels in Tanzania had more than tripled since independence. UPE was introduced by the Education Act of 1978. It begins at the age of seven and lasts for seven years (see Figure 2.4). Education at primary school level is free and almost all primary schools are government-owned. UPE was supposedly attained in 1981 with a gross enrolment of 98% of the school age cohort in primary schools. (This is an inflated figure as over-aged children were included in determining the percentage.) However, the total enrolment has since declined to 81 % of the age group.

- The majority of children start school later that the statutory age and leave before completing seven years. A recent national household survey on educational attainment (Demographic and Health Survey, 1992) indicated that only 26 % of children aged 6-10, 71 % aged 11-15 and 18 % of those aged 16-20 were attending school. This reflects a late entry and early exit from the education system.
- The quality of primary school education dropped to such an extent that only 15 % of the candidates, concentrated mainly in the urban areas, managed to pass in the Standard 7 examinations. .
- Children continuing from Standard 7 to Form I increased from 3,4% in 1984 to 15,7% in 1989. This is still at unacceptably low level. The progression problem is exacerbated by the fact that 85 % of primary school leavers neither secure formal training, nor manage to become successfully self-employed in the informal sector. There had been an attempt at a work-oriented curriculum, especially at postprimary level as well as the adoption of an equitable distribution of education across regions and between the sexes.
- Secondary education starts with Form I (average age 14 years) and lasts for six years. It comprises of a first cycle of four years (Ordinary Certificate of Education) and a second of two years (Advanced Secondary Education). Secondary school enrolment has risen consistently from 91 642 in 1986 to 166 812 in 1991. The progression from Form IV (end of ordinary secondary school) to From V is hardly 18 % (5 000 pupils) with about 4 000 pupils completing Form VI (advanced secondary) and qualifying for higher education. With the capacity of higher education institutions at 8 000 it means that the supply of students is inadequate. As a whole, the supply of graduates at the secondary and tertiary levels does not meet the manpower demands especially in the scientific and engineering fields.

- There is an acute shortage of educational materials at all levels of the education system. Textbooks, teachers' guides and exercise books are supplied with support from donor organizations but are in short supply in all schools with some primary schools having no textbooks.
- More than 70 % of primary schools in rural and urban areas are in a poor state of repair with collapsing and leaking roofs, cracked walls and floors. Almost all schools need some provision of or improvement in water and toilet facilities. On average, 45 % of primary schools have no furniture. Most urban schools have class sizes ranging from 50-150. Secondary schools are in a relatively better position. However, in the majority of these schools laboratories and workshops do not function effectively because of a lack of water, plumbing and electricity.
- Postprimary Technical Centres (PPTC) are characterized by decreasing enrolment, high operating expenses, management and accommodation problems. Technical Colleges accommodate about 2 000 students with very few girls attending (7 % of total enrolment). These colleges are generally understaffed and the output of the colleges does not meet the demands of industry.
- Teachers are demoralized because of being poorly remunerated. A significant number are un- or underqualified.
- Tertiary and higher education is driven by supply rather than demand, resulting in people trained for opportunities that do not exist. These tertiary institutions, in general, are poorly resourced. The two universities (Dar es Salaam University and Sokoine Agricultural University)) have a major role to play in satisfying the demand for high-level manpower. However, enrolment rates remain stagnant and disproportionately biased towards the humanities. The 42 teacher training colleges provide all the teaching staff for primary schools and

diploma teachers for lower levels of secondary education. The University of Dar es Salaam offers training for secondary school teachers and lecturers for colleges of education.

- Currently, the trend is that adult illiteracy levels are increasing. The illiteracy rate which was only 10 % in 1984 had risen to between 20 and 30 % in 1992 (about 1,6 million adults are illiterate). The earlier effective adult literacy campaigns (especially of the sixties) have lost their momentum because of resource constraints and adults not appreciating the value of literacy education.
- The share of the national budget (excluding national debt servicing) allocated to education over the period 1984-1991 has been in the region of 12 %. In real terms, however, the per capita expenditure has been decreasing. (Task Force, 1993) With about 5 % of the development budget allocated to education, education has become critically dependent on donor aid. Primary education received the largest share of the education budget (45,9 %). In per capita terms TSH 3 200 was spent per primary school child compared with the TSH 160 000 per secondary school pupil in 1990/91. It could therefore be argued that expenditure per primary school child needs to be increased to alleviate the problems experienced at this level.

In mapping out the future direction of education in Tanzania, the Task Force (1993) stressed the importance of science and technology education, as it argued that appropriate technology becomes the key to increased socio-economic progress, sustainable development and self-reliance. All learners would need to acquire basic scientific knowledge to enable them to function in an era of rapid scientific development. Equally important would be the need for learners to acquire a basic understanding of their social and political role and rights and responsibilities in a changing society. It stated that, in the 21st century, Tanzania would need to reinforce the concept of "education for all" as a basic human right. (Task Force, 1993) Primary school enrolments would therefore have to be increased and strategies aimed at adult literacy developed. Enrolment at other levels of the education system would similarly have to increase. In conjunction with this, the teaching and learning environment should be vastly improved by adjusting class sizes to 45, rehabilitating and expanding schools and making learning materials available. (Task Force, 1993) Given the scarcity of resources and the economic position of Tanzania, this seems to be an over-optimistic scenario.

The report of the Task Force was rejected by the government - not so much because of the recommendations contained in it, but because it was published as a government document before it was properly approved. A new policy document is currently under review and is expected to form the basis of a new education act for Tanzania. Until the new act is promulgated, the provision of education will still be determined by the Education Act of 1978 in which the principles of both Education for self-reliance and UPE are upheld.

2.4.5 Provision of education in Kenya

(1) Background

Kenya, with its population of nearly 26 million, is located in the heart of Africa. The Rift Valley cuts through the centre of Kenya, dividing the central highlands from the western plateau. The wide floor of the valley is semi-arid and sparsely vegetated.

The highlands and part of the coastal plain provide excellent arable land whereas the semi-arid regions are well suited for cattle farming.

The central parts of Kenya are one of the oldest inhabited regions in the world. The East African coast has been known to the outside world for centuries. Well established trading posts were set up by the Omani Arabs between Somali and Tanzania. In the Kenyan hinterland, a few large and important kingdoms existed, the largest being the Kikuyu, Masai, Luo and Kamba. Their origins were Bantu, Nilotic (the Luo) and Hamitic (the Masai). From the beginning of the 20th century, European settlers filtered into Kenya and Kenya became a British colony.

On 12 December 1963 Kenya gained its independence with Dr Jomo Kenyatta as the first president. One of the priorities of the government was to integrate the education system and to expand it to afford more black people the opportunity of benefitting from education.

At the time of independence, the Kenyan Government confirmed its faith in the private enterprise system and guaranteed to protect foreign investment. At the same time it stated its objective of the Africanization of the economy and its support for African capitalism in both trade and industry.

The economic performance of Kenya since independence can be divided into two periods:

- 1963-1973 (the so called "golden era" typified by an high economic growth rate of 6 % per annum in GDP terms and a constant positive balance of payments),
- 1974 onwards (the era of economic decline and structural adjustment). The economic decline since 1974 was caused by external and internal factors. Externally, the oil crisis of 1974 increased the price of this important import commodity. At the same time the international export market deteriorated; great fluctuation in the exchange rate occurred; the interest rates on loans increased resulting in an debt crisis and a worldwide economic recession was experienced. These shocks were exacerbated by internal factors such as expansionary policies, structural rigidities and an ever increasing import demand. The combined effect on the economy was that Kenya was forced to adopt structural adjustment programmes to meet IMF and World

> Bank conditions for loans and credit. These often resulted in increasing the poverty of the people making it extremely difficult to implement new policies and sometimes these had to be discarded because of internal pressures.

Following the death of Kenyatta in 1978, Daniel Arap Moi became president. Through the dominance of KANU as a political party, Kenya became a one-party state in 1982. The period that followed saw President Moi increasingly restricting opposition and violating human rights for which Kenya was internationally criticized. In 1990, the strong suppression of opposition in Kenya led to multilateral and bilateral creditors suspending aid (totalling nearly US$1 000 million) to Kenya, pending the acceleration of both economic and political reforms.

By 1993, funding had still not resumed (World Yearbook, 1994) and indications are that some of the donors may not return to Kenya even though multiparty elections took place in December 1992.

Some 16 % of the urban labour force was estimated to be unemployed in 1992. Kenya's agricultural development has been intermittently hindered by low rainfall, while the high population growth has exacerbated unemployment. The deterioration of trade is reflected in the increase in the balance of payments deficit. Shortages of certain categories of skilled labour are experienced amidst an ever increasing rise in the number of the educated unemployed.

(2) Brief overview of the development of education since 1963

Two major aspects of the political development in Kenya impacted on the education system. In the first place, the colonial era established a segregated and unequal education system that was unacceptable to the population at large, and secondly, the ideology of Africanization and self-reliance gave direction and impetus to the development of education in the postcolonial era.

With independence in 1963, a different socialization process was needed to change racial and ethnic prejudices that had been nurtured during the colonial era and to build national unity. (Eshiwani, 1990) Appropriate education was needed in quantity and quality to prepare people to take up their roles in society. Great emphasis was therefore placed on education as a vehicle for national development, increasing income and enhancing the quality of life. The KANU Manifesto (1964) committed itself to the eventual provision of universal free education and spelt out the socio-economic aspirations to be met by education.

For many people, the burning issue at independence was the provision of more education. It was, however, clear that the government could not provide the necessary schools and, shortly after Kenya gained its independence, President Kenyatta encouraged the country to form community-based self-help schemes in the spirit of "harambee".[18]

Harambee projects required local people to pool their financial and labour resources to build community projects such as schools. It should be noted that the idea of independent schools built by the community was not a new concept in Kenya. However, the call for harambee gave new impetus to this movement.

Harambee schools mushroomed. The government's reaction was ambivalent. On the one hand, these schools were valued, but at the same time they were providing pupils with qualifications that were not wholly consistent with the needs of the economy. (Mwiria, 1990)

It was only in the Second National Development Plan (1970-1974) that the government accepted some responsibility for harambee schools in order to improve the quality of the education and the efficiency of the schools.

The support for harambee schools was reversed with the next development plan. Although the cost of supporting a great number of harambee schools was cited as the main reason, the problem of the educated unemployed was the main issue. Despite this reversal, harambee schools continued to grow. By 1979 there were 1 319 unassisted and unaided harambee schools catering for 222 952 pupils, whereas the 418 government schools had an enrolment of 145 357. Out of a total of 2 485 secondary schools in 1987, 1 497 were harambee schools and there are signs that this number is still growing.

The Third Development Plan (1974-1979) highlighted the constraints imposed on development by the underutilization of human resources and a lack of appropriate skills. The education system was called upon to provide high-level manpower and skills for Kenyanization and the economic and industrial development required. The development plan placed specific emphasis on providing technical and vocational education; changing attitudes of the people to assist with the development of Kenya; increasing on-the-job training in agriculture and industry; increasing literacy training and ensuring equality of educational opportunities. The emphasis on the development of skills is also found in the KANU Manifesto (1979). The Manifesto stated that the people's potential and skills must be harnessed by creating appropriate opportunities to enhance self-sufficiency in manpower.

Against this background, the National Commission for Education Objectives and Policy (NCEOP) was appointed in 1976. NCEOP drew attention to the fact that economic growth in Kenya was accompanied by growing levels of unemployment; that the education system was viewed by people as the best way of advancement; that the objectives, content and structure of the education system were highly selective and that educational disparities were being reinforced.

Most of the recommendations made in the NCEOP Report (1976) were never implemented. The reason for this is difficult to determine. It was argued that the cost of implementing the recommendations and in particular the new education structure proposed, was beyond the means of the government. Ironically, such a major change in the structure of the education system was brought into effect shortly after the recommendations of the Mackay Commission were released in 1981.

The Presidential Working Party on the Second University under the chairmanship of Prof MacKay was appointed in 1981 to determine the need and feasibility of establishing a second university. The MacKay Report was controversial in more than one respect. It was claimed that it went beyond its terms of reference by making recommendations which spilled over into primary and secondary education. (See Sifuna, 1993; Abagi, 1994) In essence, the MacKay Report recommended that a second university with a technological bias be established; that provision be made for continuing education; a Council for Higher Education be established and that the length of university education be extended to four years by removing the A-level segment of secondary education and restructuring the education system.

It is this last recommendation (that was accepted and implemented by the government in 1985) that became specifically controversial and which requires further attention.

MacKay argued that the introduction of the new education structure would streamline the education system and at the same time ensure sufficient numbers of students at university level. The saving on the phasing out of the A-level could be used to fund the changes required at primary level. The structure of the education system (8-4-4 system) is graphically illustrated in Figure 2.5 (p. 60). It should be borne in mind that part of the reason for recommending the new system was to make it more responsive to the needs of Kenya. Attempts at greater articulation between the various modes of education were therefore built into the structure.

The idea of restructuring the system was favourably received and implemented by the government. In introducing the system, the government appreciated the fact that it was an expensive system to implement and that parents would have to assist in the financing of its implementation. Additional costs were attributed to new curricula and resource materials that had to be developed; additional classrooms, workshops and science laboratories had to be erected at primary schools to cater for the Standard 8 class which was transferred to primary schools (the number of additional classrooms and workshops was estimated at 13 370); and more teachers were needed at primary schools for the Standard 8 class (11 500 teachers).

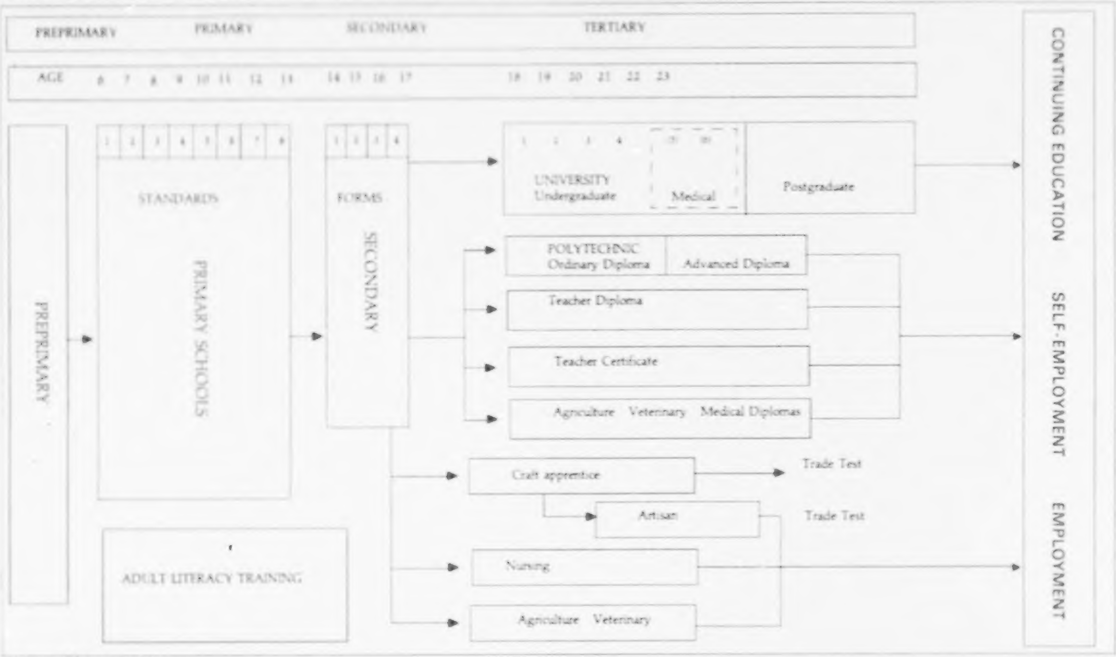
Since its inception, the 8-4-4 system has met with severe criticism. It was claimed that the system was burdensome to parents and teachers; that it was expensive and required a lot of additional books and materials which parents had to purchase and that teachers were not adequately prepared for its implementation. Other analysts (Sifuna, 1993, Abagi, 1994) indicated that the proposed new system was never put to public debate, that it was hastily implemented and that research evidence available on experiences with the vocationalization of education in Kenya and abroad was never sought.

(3) Critical analysis of the development of education in Kenya

In reviewing the development of education in Kenya since independence, four main achievements can be highlighted.

Firstly, Kenya succeeded in expanding its education system in quantitative terms from preprimary to higher education level. The primary education

FIGURE 2.5
STRUCTURE OF THE EDUCATION SYSTEM IN KENYA


PREPRIMARY
PRIMARY
SECONDARY
TERTIARY
AGE 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23
PREPRIMARY
1 2 3 4 5 6 7 8
STANDARDS
PRIMARY SCHOOLS
1 2 3 4
FORMS
SECONDARY
1 2 3 4
(5) (6)
UNIVERSITY
Undergraduate
Medical
Postgraduate
POLYTECHNIC
Ordinary Diploma
Advanced Diploma
Teacher Diploma
Teacher Certificate
Agriculture Veterinary Medical Diplomas
Craft apprentice
Trade Test
Artisan
Trade Test
Nursing
Agriculture Veterinary
ADULT LITERACY TRAINING
CONTINUING EDUCATION
SELF-EMPLOYMENT
EMPLOYMENT

Source: Eshiwani, 1993.

enrolment figure for Kenya in 1975 was 88 %. This increased to 95 % in 1987. (Socio-economic Profiles, 1990.) These figures are, however, misleading as overaged pupils in primary schools are not excluded when these percentages are calculated. Furthermore, it should be borne in mind that in 1985, Standard 8 was added to the primary education sector which may have had an inflatory effect on the numbers provided.

Secondary schools in Kenya are classified by the government in terms of maintained schools, state assisted/aided schools and unaided harambee schools and private schools.

Compared to other sectors of the education system, the highest growth was experienced in secondary education where the average annual growth was 64 %. This, as indicated earlier, was the direct result of the harambee movement.

Universities form the largest part of the higher education sector with 40 562 students. Like many other African countries, most of the graduates qualify in the arts and humanities. These graduates cannot be absorbed into the labour market as the supply by far exceeds the demand for this type of graduate. At the same time there is a shortage of people trained in the scientific and engineering fields.

This quantitative growth is also reflected in the budget allocated to education. After independence in 1963, 14,6 % of the total recurrent budget was allocated to education. This figure rose to 30 % by 1970 and to 34,9 % in 1974. The total amount of the recurrent budget allocated to education peaked in 1976/77 when 36,6 % was allocated. Since then it had averaged at about 34 %. Education's share of the development budget showed a similar increase for the period up to 1968/69 at which time 12 % of the development budget was allocated to education. Since then it has dropped to 4,9 % in 1979/80 as a result of the harambee movement.

The second major achievement has been a direct result of the massive expansion of the education system which resulted in a diversity of education and training institutions being established to cater for the education needs at all levels of the education system. This is exemplified by the higher education sector in Kenya which includes a wide variety of post-secondary institutions focusing on training in agriculture, education, health, commerce, housing, veterinary science, administration, secretarial work and technology. At tertiary level, eight universities and three polytechnics have been established since independence.

A third achievement was the introduction of the 8-4-4 system. Albeit controversial, this system should be recognised as a major break with the old colonial education structure. Finally, whether one agrees with it or not, UPE has officially been achieved. Free primary schooling was introduced by the government in 1974. At that stage it was claimed that Universal Primary Education (UPE) had almost been attained.

Contrary to these achievements, a number of concerns within education were highlighted during interviews or in the literature consulted. These include:

- *Ensuring relevant education*
  Developments in education in Kenya since independence have been very much directed at offering an education which would inculcate the knowledge, skills and attitudes needed by students in the labour market and in adulthood. Although much progress has been made through the efforts of the Kenya Institute of Education to develop curricula aimed at educational reform and relevant education, it would appear that these reforms did not improve the relevancy or quality of education, nor did they improve the quality of materials and instructional approaches.

- *Defining the content of practical subjects/vocational education at primary and secondary education levels*
  Closely related to the issue of the relevancy of the curriculum is the debate on the vocationalization of education. On the one hand, providing TVET is more expensive than providing academic education. Since its inception, technical and vocational education has been perceived as an instrument to reduce unemployment. If this criterion is applied to technical high schools, then this aim had not been achieved by 1985. Lauglo (1989) found that of those pupils who attended a technical secondary school, only 8,1% (39 pupils out of 481) found a job with only seven being employed in a trade relevant to their training and only one being self-employed. In evaluating technical secondary pupils' performance Kangethe (1985) came to the conclusion that these pupils had no advantage over pupils from other secondary schools. They were not doing the same job better than other pupils while graduates from general academic schools tended to progress faster.

- *Quality of education*
  The rapid expansion of the education system in Kenya is invariably marked by concerns for quality. These are related to pupils' level of achievement and conditions of places of learning which include insufficient building facilities, teaching materials as well as unqualified teachers. In total, nearly 20 % of serving teachers are unqualified. This will obviously have a negative effect on the education offered and should be addressed. Harambee schools, and to a lesser extent government schools, are in need of maintenance and upgrading. Facilities at technical training institutions are outdated and textbooks and other learning materials are generally in short supply.

- *Inequalities and disparities in the provision of education*

  Regional differences and disparities in the provision of education have not been solved by changes in the education system. On the contrary, programmes such as the harambee movement intensified the disparities with facilities at government schools being better. The disparities also affect rural education. The NCEOP Report (1976) has already recommended that the rural education sector should receive urgent attention. Indications are that this has not been attended to.

- *The dilemma of women in education*

  The participation rate of women in secondary and higher education in Kenya remains low. This is especially evident in the low number of women enrolling in scientific and technological fields of study.

- *The financing of education*

  The increasing demands at all levels of the education system are exerting tremendous pressure on the treasury. It is clear that Kenya is already spending more on its education system than many African countries. The result is that it is forced to implement cost-sharing strategies. At the same time, poverty and unemployment levels are putting education beyond the means of many people thereby marginalizing them.

- *The provision of higher education*

  The education system is not succeeding in producing the right kind of manpower in the quantity needed. University education is heavily skewed towards the arts and humanities while science and engineering are grossly underrepresented. Polytechnics offer training at technician and technologist level. Sandwich courses are offered in co-operation with employers in most training fields. However, the output at this level is unsatisfactory: too few students study at polytechnics and the industry base of the country is too small to expand training at this level vastly.

At the Regional Conference on the Recognition of Qualifications held in Lagos (1989) it was accepted that the ratio of engineers to technicians to artisans should be 1:5:30. If this test is applied to Kenya, then the ratio: engineers to technicians to artisans is 1:2,6:2,7. (Njiru, 1993) Given the high premium placed on manpower development since independence, it could be argued that the system has failed to produce the right calibre of trained people in the quantity needed.

2.4.6 Provision of education in Malawi

(1) Background

> *Malawi takes its name from the vast and splendid lake that occupies nearly a fifth of its total area. The name MALAWI means: "the lake where sunhaze is reflected in the water like fire."*

Malawi is a relatively small land-locked country (94 080 km^2) lying south of central Africa. It is a densely populated (72,2 persons per km^2) agricultural country with a pleasant climate. Lake Malawi covers 20 % of the country. The lake area receives less rain than the interior. To the north some excellent arable land producing tobacco, tea, sugar cane and coffee is found. Malawi is home to six major ethnic groups (Chewa, Yao, Chipoka, Tonga, Tumbuka and Ngonde).

Malawi was formerly the British protectorate of Nyasaland. It gained independence on 6 July 1964. Like many African countries, Malawi became a one-party state with Dr Banda as president in the sixties. In 1971, Banda became life president and the first African head of state to visit South Africa.

Banda's dictatorial policies have created internal dissent as well as international opposition. He relied on political imprisonment, a censored press and a network of informers to stifle opposition. Numerous allegations of human rights violations were levelled at the government. As criticism and opposition to the government grew, it took stronger measures to suppress it. As a result of the abuses of human rights, Western donor nations suspended all but urgent humanitarian aid to Malawi in mid-May 1992. By October 1992, Dr Banda conceded to international and local pressure for the introduction of a multiparty democracy. Multiparty elections were held in 1994 and Bakili Muluzi was elected as president.

Malawi's economic development since independence is characterised by two distinct features. Firstly, as a result of being classified as one of the poorest nations in the world (Malawi had a per capita GNP of $170 in 1988 making it the sixth poorest country in the world), it received massive inflows of aid from the West. The World Bank Consultative Group, for example, pledged US$508 million support in Malawi's poverty reduction strategy in 1990. Secondly, Banda's support for capitalism and opposition to communism saw the economy developing along the lines of private investment. These two factors made it possible to show a rate of economic growth (6,1 % per annum in real terms) that was remarkable in Africa. This growth was the direct result of a sharp increase in investment, supported by favourable government policies and an influx of foreign aid and capital.

However, the initial success of economic development was only partly the result of donor aid. Malawi's economic performance is largely dependent on weather conditions, the productivity of its peasant farmers and international commodity prices, as well as the political stability in the countries through which it must export its commodities.[19] The droughts of the early eighties resulted in a decline in agricultural output and forced Malawi to import food, while associated industries began to experience severe reductions in revenue. At the same time foreign debt began to escalate while investment and aid declined sharply. These factors resulted in a persistent rise in the deficit on the current account. The deficit on the current account was offset only by means of substantial foreign borrowing and by depletion of reserves.

In 1988, the Malawi Kwatcha was devalued at debt rescheduling agreements signed with banks and creditor governments. A four-year development programme was launched in 1988 with support from the IMF, World Bank and other donors. The budget deficit was reduced, import controls eased and state controlled enterprises restructured.

Unlike the other African countries studied, Malawi has never attempted to determine a detailed economic plan as the basis for development policies. Instead, the government of the former President Banda has opted for statements of intent, policies and budget forecasts as an illustration of possible trends, rather than as a framework for control or direction. Its development strategy has tended to reflect the private enterprise principles that underpinned the agricultural policy. Primary education and health were viewed as non-productive investments and hence received low priority in the development budget. Contrary to this, transportation was viewed as vital to Malawi's export-oriented economy and represented the largest single item of the development expenditure. The majority of the roads built have been for "crop extraction".

Labour has been a source for earning foreign revenue for many years. Traditionally thousands of migrant labourers found employment outside the country, especially on the mines of South Africa. At the height of the migrant labour era, some 270 000 Malawians were working abroad.

After an air disaster in the early seventies in which 45 mine workers travelling from South Africa were killed, the number of migrant labourers was greatly reduced. In 1985, the total number of migrant labourers was less than 30 000. The total labour force (mid-1991 estimates) was 3,7 million of which 2,7 million were involved in agriculture, forestry and fishing. Unemployment remains one of the most pressing problems in Malawi.

(2) Overview of the development of education since independence

Malawi, like most of the other countries studied, inherited an education system that was racially segregated and poorly developed at the time of independence. Prior to 1964, when Malawi became independent, education was left in the hands of missionaries who ran primary and secondary schools, teacher training colleges and trade schools. The colonial government ran only three secondary schools located in each of the three regions in the country.

One of the first priorities of the new government was to expand the provision of education at primary, secondary and tertiary levels and to gear the system to produce the categories of manpower needed for the Africanization of the formal employment sector.

The first formal Education Plan for Malawi covered the period 1973 to 1980, and apart from certain objectives listed, set the target of raising the gross enrolment at primary school level from 33,5 % to 50 % and at secondary schools from 3 % to 15 % of the appropriate age groups. As far as the target for primary education was concerned, signs of over-implementation could be detected by 1980 as the said target was exceeded by 20 % - at that stage nearly 70 % of the age cohort attended primary school.

As a result of this massive expansion, increases in secondary education enrolment could not keep abreast and although the number of secondary school places increased from 13 451 to 18 006, the enrolment target of 15

% of the target age group could not be achieved. Nevertheless, the overall expansion of the education system during this first plan period was significant.

The Second Education Development Plan (SEDP) (1985-1995) was more comprehensive than the first as it included all levels of the education system (see the structure of the education system as illustrated in Figure 2.6,[20] p. 71) and set targets for each phase and sector of the education system.

One of the main concerns of the SEDP was to strengthen the policy of open access to primary education with the long term objective of eight years, universal basic education. The target of 85 % of the age cohort attending primary school by 1995 was set.

According to the SEDP, secondary education opportunities had to remain geared to serving economic development rather than social demand. The result was that there continued to be limited access to full-time secondary education. In setting out its aims for secondary education, the government reaffirmed its intention to ensure that secondary schools produce sufficient numbers of JCE and MCE students to meet the manpower needs of the country. The target was set at 34 000 full-time secondary and 44 000 active correspondence enrolments by 1995. The government also committed itself to ensuring quality secondary education. Measures aimed at improving the quality of secondary education included the upgrading of teacher qualifications, reducing the pupil:teacher ratio to 25:1, ensuring continued curriculum development and inspection, reducing the unit cost of secondary education and promoting cost sharing.

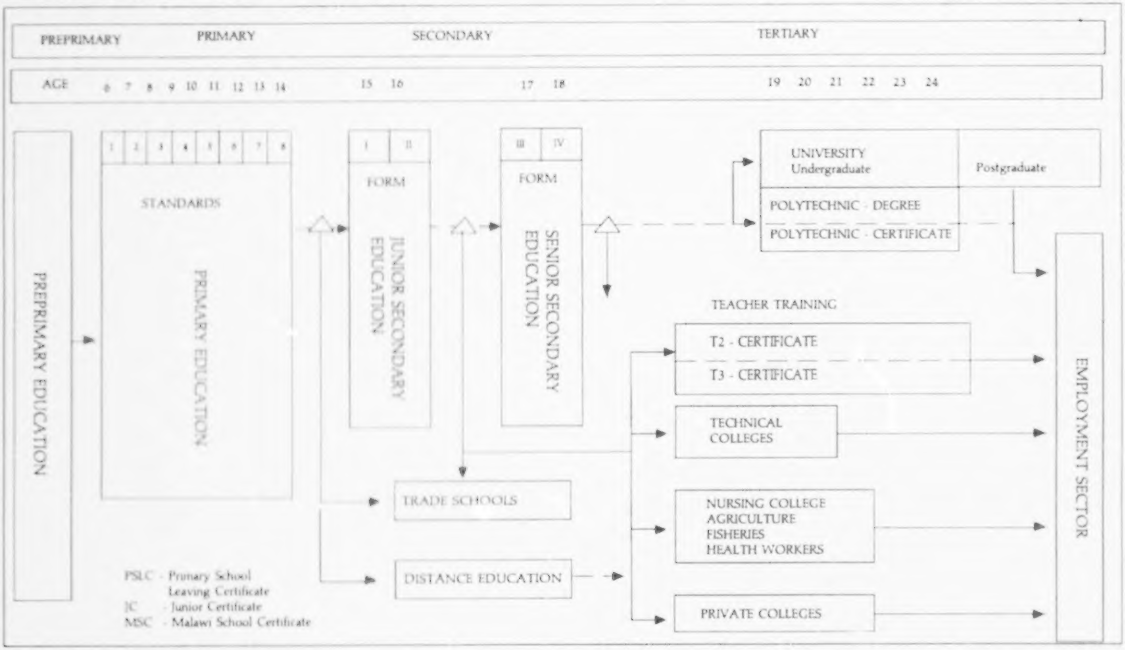
The SEDP also committed itself to the further expansion and development of TVET so that an adequate supply of skilled manpower could be ensured. It was anticipated that the capacity of TVET had to be doubled to provide for 2 200 students by the end of the planned period. The emphasis was to be on providing more job specialization and on giving trainees the skills and abilities needed for self-employment in appropriate fields. The SEDP further undertook to seek ways of linking TVET with economic development projects, business development and community extension activities.

The new government, which came into power in 1994, did not reaffirm its commitment to the SEDP, but, instead, committed itself to the alleviation of poverty in Malawi. This policy will be targeted at the rural areas where the majority of people live.

Given the focus on the alleviation of poverty, it may be inferred that education will be directed at the improvement of technical skills and entrepreneurship education to improve the livelihood of people. (See Phiri, 1994.) It is also possible that informal sector training for self-reliance will feature prominently in future planning and provision. At the same time, the quality of technical college training will probably be improved and research at university intensified to develop appropriate technology to meet the needs of the country.

The emphasis of the new government on the alleviation of poverty will also impact on future curriculum development in Malawi. It is envisaged that design and technology will be introduced at primary school level. In this, pupils will be encouraged to use local materials to design useful articles. (Phiri, 1994) Design and technology will also be extended to secondary schools where students will be exposed to drawing, woodwork, metalwork and plastic, linked to real life problem-solving challenges.

FIGURE 2.6[20]
EDUCATION SYSTEM OF MALAWI


PREPRIMARY
PRIMARY
SECONDARY
TERTIARY
AGE
6 7 8 9 10 11 12 13 14
15 16
17 18
19 20 21 22 23 24
PREPRIMARY EDUCATION
1 2 3 4 5 6 7 8
STANDARDS
PRIMARY EDUCATION
I II
FORM
JUNIOR SECONDARY EDUCATION
III IV
FORM
SENIOR SECONDARY EDUCATION
UNIVERSITY Undergraduate
Postgraduate
POLYTECHNIC - DEGREE
POLYTECHNIC - CERTIFICATE
TEACHER TRAINING
T2 - CERTIFICATE
T3 - CERTIFICATE
TECHNICAL COLLEGES
NURSING COLLEGE
AGRICULTURE
FISHERIES
HEALTH WORKERS
PRIVATE COLLEGES
TRADE SCHOOLS
DISTANCE EDUCATION
EMPLOYMENT SECTOR
PSLC - Primary School Leaving Certificate
JC - Junior Certificate
MSC - Malawi School Certificate

Source: Eshiwani, 1993.

(3) Critical analysis of the development of education since independence

The targets set and aims formulated in the SEDP will mainly be used as criteria in evaluating the achievements and failures of the education system. An attempt will also be made to highlight some of the major challenges facing the development of education in Malawi.

(a) Universal Basic Education

In 1993, nearly 1,8 million children were attending primary school and, although this represented twice the number enrolled in 1984, it was still only 55,9 % of the age cohort. Proportionally, this represents a lower participation rate than a decade before and, although there has been a massive expansion in numbers, the ideal of UBE is still beyond reach.

(b) Provision of secondary education

At secondary school level, the target set of 34 000 full time secondary students had been achieved in 1993 if those attending private schools are included. If the latter are excluded, the target had not been reached, and the target set for distance education had also not been achieved. The target of 15 % of the secondary school age cohort attending school, was also not reached, nor the aim of reducing the pupil:teacher ratio to 25:1. The traditional focus on universal primary education has resulted in a situation in which the progression to secondary education is very limited. The social demand for secondary education has always been scorned for the sake of a manpower demand approach. It will be important to find a greater balance between the two factors so that greater equity in providing opportunities for secondary education can be secured.

(c) Provision of TVET

Thirteen technical secondary schools with technical wings were established. Of these, only five were still offering technical training in technical drawing, woodwork and metalwork in 1994. A further 24 primary schools were designed with technical wings, but none of these currently offers any technical education. The main aim of the technical secondary schools was to equip pupils with basic skills in technology for self-sustenance after school. This aim was never realised and the general impression gained was that these schools did not succeed in preparing pupils adequately for further studies at a technical college; nor did they prepare students for industry and did not offer a good quality general education.

Currently, there are seven technical colleges in Malawi offering craft training and six trade training centres. The total enrolment at technical and vocational training colleges in 1993 was 863, which was well below the target of 2 200 set in the SEDP. The Polytechnic provides specialized training in applied technology. It became a constituent college of the Malawi University when the latter was established in 1965.

The Polytechnic consists of two semi-independent institutions, namely the degree/diploma offering Polytechnic and the Polytechnic Board of Governors offering artisan/technician courses. Phiri (1994) stated that the number of technicians graduating from the Polytechnic in 1993 was still the same as the number who graduated in 1970.

The Polytechnic, technical colleges as well as the technical wings attached to secondary high schools were built and equipped through donor funds in the early seventies and eighties. The equipment used in these centres has become obsolete and in dire need of replacement or upgrading. The donors who originally established these centres are no longer willing to support them as the donor emphasis has moved to basic education. Phiri (1994) indicated some of the measures that could be employed to rationalize that which is available in order to improve the effectiveness of the training offered (e.g. by re-allocating equipment standing idle at secondary and primary schools to technical colleges). These measures may solve some of the short term needs, but in the longer term proper upgrading of facilities will be unavoidable.

(d) Quality of education

The rapid expansion of the education system at primary school level has implications for the quality of education. This is related to pupils' level of achievement and conditions of learning which include building facilities and teaching materials. This concern extends to technical and vocational education where equipment and facilities are outdated and in dire need of upgrading.

A number of interventions were introduced in recent years aimed at improving the performance of primary education and the internal efficiency of the system. Tuition fees were abolished for Standards 1 and 2 (1991-1993); support from USAID was secured for improving education for girls and UNDP/UNESCO bursary aid for primary school children was obtained. Nevertheless, if the targets set in the SEDP are applied as criteria (i.e. a reduction of the repeater and dropout rate; reducing class sizes and pupil:teacher ratios; increasing the number of permanent classrooms and providing adequate furniture and textbooks), then the objectives set had not been attained by 1994. Persisting pupil:classroom ratios of more than 100:1 at primary school level reflect the seriousness of the shortage of facilities at this level and will have a detrimental effect on the quality of the education offered. This is exacerbated by the need for upgrading the existing facilities and the desperate shortage of teaching materials.

These factors must have an influence on the quality of education as measured by the performance of pupils in the final year of primary school as well as on dropout and repeater rates. The results of the PSLC examinations show an annual pass rate of approximately 66 % and a low progression rate to secondary school.

The percentage of pupils repeating standards was still unacceptably high, especially in Standard 8 where nearly a third of the pupils repeated the standard. Repeaters in the education system absorb scarce resources that could be put to use in other sectors of the education system.

It is therefore extremely important to reduce the magnitude of the repeater problem especially at primary school level without sacrificing the quality of the education offered.

At JCE (Form II) level, an average pass rate of nearly 90 % has been maintained since 1990. Of those who passed the JCE examination, the majority gained entry to senior secondary education. The pass rate at the level of the Malawi Certificate of Education (MCE) was much lower than that of the JCE. In 1991 the pass rate was as low as 56,3 %.

(e) Curriculum development

The Malawi Institute of Education (MIE) was established in 1972 with the aim of developing more relevant curricula for Malawi. In 1988, the first curriculum review of the primary school was undertaken. It was found that the curriculum was overloaded with subjects and content and was outdated. The emphasis in the teaching was on examinations. In 1989 the new primary school curriculum was approved and the first books to be used in primary schools released in 1991. Although much progress has been made through the efforts of MIE at developing curricula for primary schools, the need to extend this to secondary education remains a priority.[21] At the same time the production and distribution of textbooks for primary and secondary schools must be accelerated.

MIE has always been dependent on foreign aid for its operation. Apart from the World Bank and UNICEF support for the implementation of the new primary school curriculum and the production of textbooks, support was also received from UNDP for music and religious education, from CIDA for in-service training, GTZ for science kits and basic education and USAID for gender appropriate curricula.

(f) Position of women in education

The participation rate of girls in secondary education remains unsatisfactory with less than a third of the secondary school population being female. Since 1972, the Ministry of Education has actively striven to improve the ratio of female pupils at secondary schools, but this has still not led to parity. At tertiary level female representation is even worse with women accounting for only 21,3 % of university enrolment. (Davidson and Kanyuka, 1992) In discussing the marginalized position of girls in the education system, Davidson and Kanyuka (1992) pointed out that girls are generally expected to perform house chores not expected from boys, that in certain communities early marriages are arranged and some also drop out as a result of a lack of funds or pregnancies.

(g) Financing of education

The total national budget (1993) was MK[22] 1,331 billion of which 232 million (17,4 %) was disbursed to education. According to the Ministry of Education (1993) the unit cost for primary education was MK 70,5; for secondary MK 595,3; teacher training MK 2 188; TVET received MK 2 975 per student; the university MK 10 340 and distance education MK 83,8. This meant that primary and distance education were the cheapest to provide and underscores the fact that technical and vocational education is expensive. The increasing demand for education at all levels of the education system is exerting tremendous pressure on the treasury. It is clear that Malawi is already spending close to the maximum on its education system and that it is forced to implement cost-sharing strategies. At the same time, poverty and unemployment levels are putting education beyond the means of many people thereby marginalizing them.

2.4.7 Provision of education in Zimbabwe

(1) Background

In 1923, responsibility for Southern Rhodesia was transferred from the British South African Company to the United Kingdom and the territory became a British colony. It was united with Northern Rhodesia and Nyasaland in 1953 to form the Federation of Rhodesia and Nyasaland. The Federation was dissolved in 1963 as a result of opposition from Northern Rhodesia and Nyasaland. Northern Rhodesia became independent as Zambia and Nyasaland as Malawi. White minority rule was maintained in Southern Rhodesia and was met by bitter resistance from African nationalists supported by the international community.

After a long and bitter war of independence in which 27 000 people were killed, Zimbabwe became independent on 18 April 1980. The ZANU-PF party of Robert Mugabe was elected with an overwhelming majority. The stated objective of the ZANU-PF party was to establish a one-party state with a Marxist-Leninist doctrine. In 1991, after opposition from within the ranks of his own party against the idea of a one-party state, President Mugabe announced that he had abandoned his plan to establish a one-party state, but the ideals of establishing a Marxist-Leninist state were retained.

Sanctions imposed against Rhodesia in the sixties and seventies forced a restructuring of the economy which had been based on tobacco, minerals and tourism as the three most important earners of foreign exchange. This fuelled the rapid expansion of import substitution manufacturing. The result was that the newly independent Zimbabwe inherited a broad-based economy. The ending of the guerrilla war also brought immediate short-term revival in the economy. Sanctions were lifted and Zimbabwe could resume normal trade with the world.

A certain amount of foreign aid and technical assistance was forthcoming and both agriculture and industry were able to expand quickly and make the most of the new spending power.

The growth of the economy continued into the late eighties and by 1988 Zimbabwe recorded a visible trade surplus of US$501,3 million while there was a surplus of US$116,6 million on the current account. Since then there has been a slump in the economy and by 1992 there was a budgetary deficit equivalent to 9 % of the GDP which was largely the result of the drought of 1992/93. Zimbabwe's external debt totalled US$3 429 million in 1991, of which US$2 604 million was long-term public debt. The cost of debt servicing was equal to 27,6 % of the value of exports.

A five-year development programme (1991-1995), supported by the IMF, was adopted in 1991. Among other things, the *Framework for economic reform* meant changes in labour legislation and the liberalization of trade by relaxing government controls on prices, imports and investments. The reform plan also envisaged establishing small sector money-lending institutions to promote job creation in the informal sector. Another aim was to restrain government expenditure by reducing the number of public sector workers.

Zimbabwe severed diplomatic relations with South Africa in 1980. In subsequent years, Zimbabwe played an important role as one of the "frontline" states in international attempts to stabilize southern Africa and to end apartheid in South Africa. Mugabe became one of the main advocates of sanctions against South Africa and, although he tried to impose sanctions against South Africa, these were rejected by his Cabinet. The advent of multiparty democracy in South Africa has seen relations between the two countries improve significantly.

(2) Development of the education system since independence

Educational reform in the postindependence period must be interpreted against the social, political and educational policies of the former Rhodesia. Segregation between whites and Africans formed the basis of the economy, social order and consequently of providing education. The education provided for Africans was inferior to that for whites and was aimed at entrenching the privileged position of whites. (Maravanyika, 1990; Nhundu, 1992)

The Transitional National Development Programme (TNDP) (Republic of Zimbabwe, 1982) indicated that education, culture and training were to be used as a means, as well as a prerequisite for equitable growth and development and would be the main instrument for eliminating the adverse features of the colonial era. A number of issues dominated educational thinking at the time of independence. High on the agenda was the rehabilitation of the rural educational infrastructure and facilities decimated during the war of liberation. Simultaneously, the expansion of education was aimed at reaching those affected by the war, especially those thousands of school pupils and refugees who had fled.

The strategy proposed was to increase opportunities in education through expansion by introducing free and compulsory universal primary education and expanding teacher training opportunities to meet the increased demand for teachers. Secondly, the government proposed the improvement and maintenance of quality in education by ensuring the necessary assistance. Thirdly, postsecondary education was to be improved to ensure that the country became self-sufficient in the supply of manpower. Finally, non-formal education was to be strengthened and directed at adult literacy training.

Very little was done to change the structure of the education system. Seven years of primary education was retained. (See Education Structure in Figure 2.7, p. 83.) Six years of secondary education leading to A-levels was also retained with the first exit point after four years of secondary education with O-level examinations. The main difference was that 11 years of free and compulsory education with automatic progression was introduced, thereby ensuring that all pupils would have the opportunity to proceed to the O-level exit point. Limited training opportunities existed for those who dropped out before this point and, in practice, the majority of pupils aspired to continue with A-levels in Form V and VI. Very few, however, gain entry into A-level courses and many leave school at this point in search of employment opportunities. (See Nhundu, 1992.)

The Framework for economic reform (Republic of Zimbabwe, 1991) provided certain broad parameters for the future development of education in Zimbabwe. It acknowledged the progress made in education since independence, but drew attention to the fact that the inequities inherited among schools and areas still existed. The challenge faced by Zimbabwe was to maintain and build upon past successes, while at the same time, to reduce the proportion of the budget devoted to education. The main challenge was to improve learning achievements of children at school with a reduced allocation of the budget.

(3) Critical analysis of the achievements in education

Ironically, the attempts of the Zimbabwean government to provide all children with 11 years of schooling, created some very painful consequences that threatened to undermine the gains that had been achieved. (Nhundu, 1992) These should not detract from acknowledging the magnitude of the successes achieved through the expansion of education. In analyzing the education system, several main issues will be highlighted. Specific attention will be devoted to the expansion of the education system at primary and secondary school levels and the implications thereof for the financing of the education system.

(a) Primary education

As a result of the introduction of free primary education and the removal of age restrictions, primary school enrolment increased from 819 586 in 1979 to 2 147 899 in 1984. By 1988 the World Bank indicated that the Zimbabwean government, by and large, had successfully achieved the elusive goal of universal primary education. (Nhundu, 1992) Overall enrolment gradually declined during the second half of the eighties, despite a continued high population growth rate. This trend can partly be explained by the escalation of fees attached to schooling (school building fees, uniform fees, book fees) which placed education beyond the means of many parents. It may also be an indication of a loss of confidence in schooling among the general public in the light of the increasing school-leaver unemployment levels.

An analysis of the education indicators also reveals that the establishment of new schools could not keep pace with the dramatic increase in enrolments in spite of the massive reconstruction programme introduced by the government to reopen and expand schools damaged during the war. With the active participation of the community the number of primary schools nearly doubled during the first years of independence.

(b) Secondary education

With independence, secondary education was opened up and the government declared that no child would be deprived of a place in a secondary school because of a lack of money. The government sought the full co-operation of all educational authorities and institutions by extending existing buildings to take more pupils, increasing the pupil:teacher ratios and by introducing hot seating and double sessions. The result was a massive expansion of secondary education (the number of secondary schools increased from 177 at independence to 1 206 in 1984 and enrolment from 66 215 to 695 612 in 1988). Community participation greatly boosted the programme with the building of 400 community schools.

As was the case with primary education, enrolment at secondary school level has declined since 1988, possibly for the same reasons: an escalation of school fees and a loss of confidence in the benefits of education. However, the massive expansion of secondary education created problems of financing; resulted in an increase in the educated unemployed and a decline in the quality of education. (Nhundu, 1992) Nhundu (1992) claims that the increase in the number of private schools is a direct reflection of the drop in educational standards.

(c) Curriculum reform and ensuring relevant education

Like many of its African counterparts, Zimbabwe has actively striven to make education more relevant to the needs of its people and to give content to the socialist ideals of the government. The factors mentioned earlier have made attempts to convert the curriculum to the socialist ideals difficult. *Education with production** was viewed as the way to achieve the stated objectives by integrating academic subjects with practical aspects. *Education with production* was to be used to teach people to solve real life

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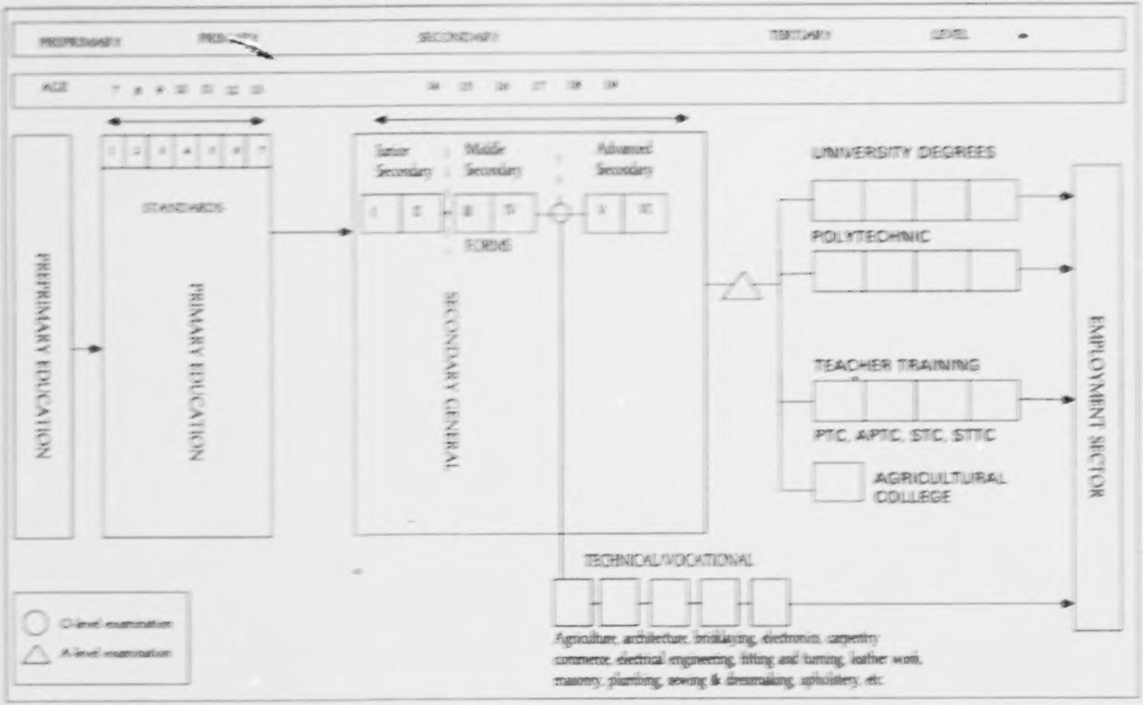
* *Education with production is based on the premise that education can help educate people to become self-reliant and to involve themselves with productive activities by infusing components into the school curriculum.*

FIGURE 2.7
EDUCATION SYSTEM OF ZIMBABWE


PREPRIMARY
PRIMARY
SECONDARY
TERTIARY
LEVEL
AGE
7 8 9 10 11 12 13
14 15 16 17 18 19
1 2 3 4 5 6 7
STANDARDS
PREPRIMARY EDUCATION
PRIMARY EDUCATION
Junior Secondary
Middle Secondary
Advanced Secondary
I II III IV V VI
FORMS
SECONDARY GENERAL
UNIVERSITY DEGREES
POLYTECHNIC
TEACHER TRAINING
PTC, APTC, STC, STTC
AGRICULTURAL COLLEGE
EMPLOYMENT SECTOR
TECHNICAL/VOCATIONAL
Agriculture, architecture, bricklaying, electronics, carpentry
commerce, electrical engineering, fitting and turning, leather work,
masonry, plumbing, sewing & dressmaking, upholstery, etc
O-level examination
A-level examination

problems. Maravanyika (1990) claims that the problem was that most teachers did not understand the philosophy of *Education with production* as it has been understood by those exiles who had practised it during the war. Many teachers saw it as growing vegetables and raising chickens at schools - activities long associated with colonial educational practices and rejected by blacks in Zimbabwe. Maravanyika (1990) concludes that *Education with production* was more of a slogan than a meaningful education philosophy that could guide education.

(d) Quality of education

One of the major concerns in Zimbabwe is the decline in the quality of education. Nhundu (1992) states that when education deteriorates, it is the poor who suffer most. Whether quality is measured by infrastructure, the teaching process or examination results, Zimbabwe shows signs of a deteriorating education system.

(e) Financing of education

Emanating from the government's commitment to redress inequalities, educational expenditure doubled during the first year of independence. Since then it has increased at an annual rate of about 10 % per year. By 1990, spending on education was equivalent to 10 % of the GDP or about 18.5 % of central government expenditure. (FER, 1991: 15) According to the Framework for economic reform (1991), the fiscal adjustment required from education is appreciably higher than that from health. It was projected that spending on education would have to be reduced by 0.5 % annually so that about 8.7 % of the GDP would be allocated to education by 1994/95. Given the expected growth in the GDP, this would still result in about 20.7 % of central government expenditure being disbursed to education. (FER, 1991: 15) The reduced GDP expenditure will be recovered by increasing cost recovery from well-endowed schools and by shifting more of the cost to parents. Secondary school education has already become very expensive with escalating school fees, examination fees and indirect costs, such as school uniforms. The combined impact of reduced government spending and increased cost to parents may well mean that more children will have to forego education.

(f) Untrained teachers

The increase in school enrolment has created an acute shortage of qualified teachers and has forced government to employ untrained, unqualified, underqualified and retired teachers. In 1988, 40,5 % of all teachers were untrained (Nhundu, 1992). The rural areas are the hardest hit by the shortage of qualified teachers. Unqualified teachers may affect the quality of education negatively.

(g) Vocational education

Prior to independence, artisan training was modelled on the British system of an indentured apprenticeship of four years.[23] This training was generally of a high quality, but very much reserved for whites. Although this form of training has been retained, the intake has fallen appreciably from 1 984 in 1981 to 933 in 1988. This was not the result of a lack of interest on the part of recruits. On the contrary, in 1989 more than 100 000 candidates applied for the slightly more than 1 000 places available. The drop in the number of training opportunities must have been caused by other factors.

The government attributed this trend to the racist recruitment practices of white managers and the white dominated private sector. To resolve this issue, the government adopted a system whereby apprentices first had to register with the Apprenticeship Board and companies were allowed to select only from those registered. This system was harshly criticized and was later abolished by government. Bennell (1993) indicated that the private sector was apprehensive of the proclaimed Marxist-Leninist policy of the government and adopted a wait-and-see attitude resulting in a cut-back in the intake of apprentices. This was exacerbated by the deep economic recession of the eighties which saw a worldwide reduction in training opportunities.

When, however, the economy recovered (and political clarity emerged) in the mid-eighties no increase in the intake of apprentices occurred. Again, this may be attributed to government interference with the introduction of centralized recruitment through the registration of apprentices prior to selection. Companies complained that the quality of candidates from whom they were forced to select was unacceptably low. At the same time, companies also claimed that the quality of training offered at the two polytechnics was poor. Thus employers felt that there was little use in recruiting apprentices who would not receive good quality instruction.

Alternative training approaches introduced by the government were based on the belief that both school-based and pre-employment artisan training could be as cost effective as apprenticeship training and could afford more people the opportunity to be trained. These alternatives were to assist in producing more skilled workers and ensure that Zimbabwe became self-sufficient in terms of its manpower requirements and, at the same time, contribute to economic development. So far, indications are that the objectives set have not been achieved.

2.4.8 Provision of education in Swaziland

(1) Background

The Kingdom of Swaziland is a small landlocked country (17 363 km^2) bordered on three sides by South Africa and on the fourth by Mozambique. The beautiful wet highlands of the west descend to the drier low-lying plains of central and southern Swaziland. The topography of Swaziland gives rise to great differences in rainfall and climatic conditions and makes agriculture vulnerable to extended droughts.

The Kingdom of Swaziland became independent on 6 September 1968. Elections in the sixties saw the traditionalist Imbokodvo National Movement (INM), established by Ngwenyama[24] Sobusa II, win all contested seats.

The Constitution of 1978 vested supreme executive and legislative power in the hereditary king (who is the head of state) and provides for a bicameral legislature (Libandla) comprising a house of assembly and a senate. The function of the Libandla was confined to debating proposed legislation and to advising the king accordingly. A cabinet appointed by the king exercised executive powers. In 1992, King Mswati III - who became king in 1986 - approved a number of constitutional changes that made provision for an electoral system, the expansion of the National Assembly and provided for a hereditary monarchy.

Swaziland has pursued a policy of dialogue and co-operation with South Africa, while maintaining good relations with other African countries. Its close links with South Africa have meant that Swaziland has been influenced by both economic and political developments in South Africa. The civil war in Mozambique affected Swaziland with large numbers of refugees seeking safety in Swaziland.

Swaziland has an open market economy dominated by trade. It is a specialized economy based on the production and processing of and trade in agricultural and forestry products which are the major activities and generators of economic wealth. (National Education Review Commission, 1985) Another important feature of the economy is the fact that it is inextricably linked to that of South Africa. Economic recession, inflation, import regulations and controls, as well as droughts in South Africa inevitably affect the economic performance of Swaziland. A high proportion of foreign direct investment in Swaziland, originates in South Africa which is also its main trading partner, both in terms of exports and imports. (MEPD, 1993) On the other hand, proximity to a large industrialized country, such as South Africa, has influenced the specialization of the economy and reduced the potential areas of diversification.

The total population of Swaziland (mid-1990 estimates) was 768 000 and the average annual population growth 3,5 %. From these indicators it is projected that the population will increase to 962 000 by 1996. This rapid growth has negative implications for the economic and social welfare of the nation. It exacerbates problems such as unemployment, degradation of the environment and the provision of quality education.

Work opportunities outside Swaziland have continued to be an important source of income and foreign exchange. In 1991 just more than 16 000 (about 10 % of the total labour force) were employed on South African mines.

(2) Development of the education system of Swaziland

At the time of Swaziland's independence from Britain in 1968, education was characterized by poor quality, uneven distribution of schools, high dropout and repeater rates, serious shortages of teachers, and inappropriate and highly academic curricula. It was estimated that two-thirds of the primary school children were not completing primary education while 40 % of the 7-13 year age group were not attending primary school. Nearly 70 % of the secondary school age cohort were not receiving any secondary education. A significant number of teachers (about 250) were unqualified.

Like most developing countries, Swaziland, in the postcolonial era, looked upon education as the main factor in nation building and development. (Magalula, 1990) Since the adoption of the First National Development Plan (1969), certain objectives have remained broadly the same although some of the detail has changed over the years. The overall goal of the government was to provide all Swazi citizens with an education which was both appropriate to their needs and abilities and met the country's development requirements. (MEPD, 1993: 111) A particular concern was the eradication of illiteracy.

The First National Development Plan (1969-1973) emphasized the expansion and improvement of primary and secondary education, the training of teachers and other high-level manpower, as well as the need for curriculum development. Although much progress was made during the 1969 to 1973 period, the quality of education remained below acceptable levels. Therefore in the Second National Development Plan much emphasis was placed on the restructuring of education, raising the quality of education and making education relevant. Expansion and making more educational opportunities available remained a priority.

The continued progress made with the expansion of education enabled the government, in its Fourth National Development Plan, to focus on improving quality and relevance in education and, at the same time, expand teacher training. The plan aimed to develop the curriculum, improve the administrative capacity of the ministry and improve systematic planning, monitoring and evaluation.

A survey conducted by the government in 1975/76 found that more than half the classrooms in primary schools were inadequate, the majority being without proper equipment and facilities. At secondary school level, the rapid expansion in enrolment and the corresponding increased need for teachers led to an increase in the percentage of unqualified teachers employed. The result was that the secondary school system was inflicted with the same problems of low quality as the primary school sector. Dropout and repeater rates were unacceptably high in both primary and secondary schools.

The Second National Review Commission was appointed in 1984 and produced its findings in 1985. The Commission stated that the ideal of universal primary education had been achieved on target (1985) and that attention had to be be directed to the consolidation of education and the improvement of the quality of education. Recommendations made included the following:

- Free preschool education should be provided to all 3-5 year olds close to their homes. This was viewed as a long-term recommendation.
- All children should benefit from a compulsory, diversified curriculum of nine years of basic education which would enable them to acquire a greater degree of maturity and to make appropriate choices for life.
- A diversified curriculum should be offered to cater for children's different talents and aptitudes.
- Continuous assessment should be introduced and examinations adapted to a diversified O-level type syllabus, recognized internationally and equivalent to Cambridge Overseas O-levels.

Many of these recommendations were accommodated in the National Development Plan (1993/95).

(3) Critical review of the development of the education system

The present provision of education should be evaluated in terms of the expansion and development of the education system during the last decade. The education system of Swaziland is graphically illustrated in Figure 2.8 (p. 94). Seven years of primary education culminates in the

Swaziland Primary Certificate (SPC). Junior Secondary Education takes three years (Form I to Form III) to complete. The Junior Certificate (JC) is awarded for the successful completion of Junior Secondary Education. The two-year Senior Secondary Education (Form IV and Form V) prepares students for the O-level COSC.

Preprimary education in Swaziland is aimed at providing care and supervision for children aged 3-5 and preparing them for primary education. Rules and regulations governing the registration and operation of preschools were issued by the Ministry of Education in 1988. Furthermore, the ministry has standardized the curriculum and has started in-service training for preschool teachers. In 1992 402 preschools with an enrolment of 17 323 were operating compared to the 262 preschools in 1990. (Swaziland Government, 1994) About a quarter of these were situated in the rural parts of Swaziland. Schools were mainly owned by communities, private individuals or companies.

Between 1968 and 1985 the paramount goal of the government was to build an education system to provide for *universal primary education*. This was achieved by 1985. In 1988, the total primary school age cohort (6-12) was 138 824 and the primary school enrolment (Grade 1-7) 152 895. The primary enrolment included 2 731 underaged, and 13 486 overaged pupils. This meant that only 2 % of the relevant age cohort were not in primary schools. (Dlamini and Dlamini, 1990; Nsingwane and Dlamini, 1990) This implies that the threshold of universal primary education has been reached and that the role basic education has to be redefined to include skills development and prevocational education. Such a policy will provide an alternative to purely academic education and provide essential life skills and technical knowledge necessary for self-employment and further training.

By 1994 the number of primary schools had increased to 521 and primary school enrolment to 192 599 pupils. Projections show that the number of pupils requiring basic education will continue to increase by about 3,9 % per year. (MEPD, 1993)

Since 1968 the *representation of both sexes* in schools has been equalized to the point that today there is virtually no difference in numbers. Differences in representation at primary school level are often the result of higher repetition rates among boys. (Ministry of Education, 1994) In 1994, 16,8 % of primary school boys repeated a standard, while only 12,6 % of the girls repeated a standard.

Dropout and repeater rates are still regarded to be unacceptably high. It is estimated that, on average, it takes 8,6 years to complete the seven years of primary education. (Ministry of Education, 1994) The Ministry of Education (1994) found that boys are on average two years too old for their class and that only 25 % of primary school children are the appropriate age for their grade. In order to improve student achievement, a new system of continuous assessment was introduced in 1993.

The growth in primary education was met by a phenomenal growth in *secondary education*. In 1994, 52 571 pupils were receiving secondary education in 165 junior secondary and high schools. The pupil:teacher ratio was 18:1 and the pupil:classroom ratio 30:1. The overall repeater rate (1994) at secondary school level was 9,9 % for boys and 10,1 % for girls. This was lower than for previous years.

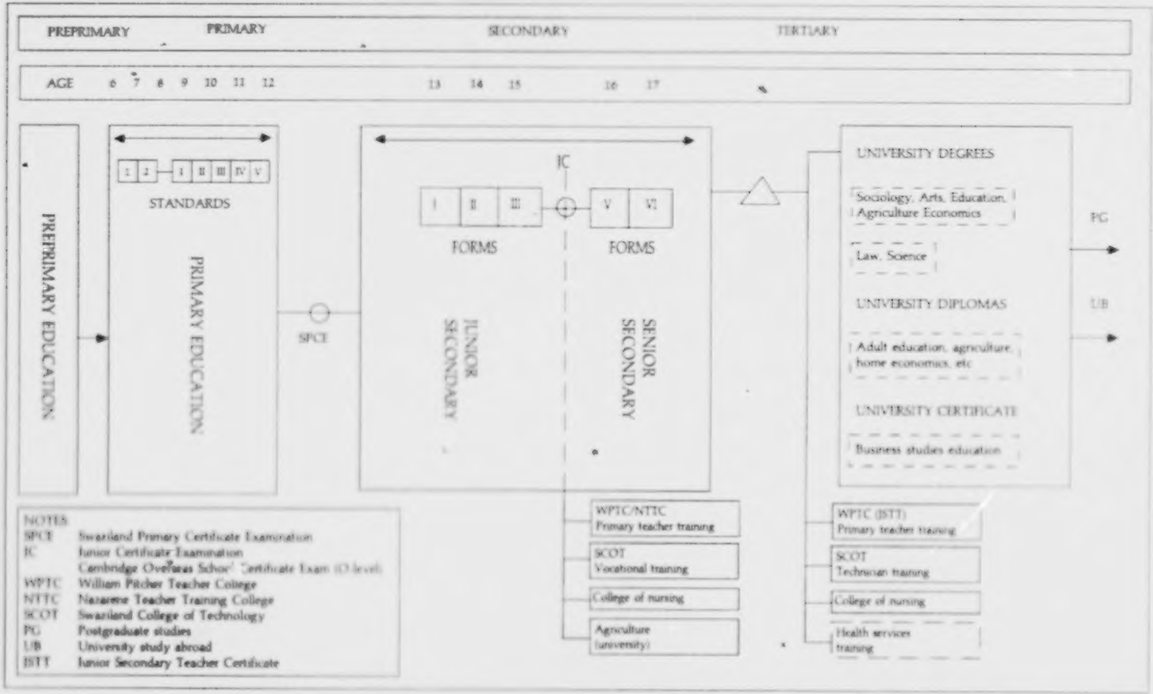
Relatively speaking, the increase in *teacher numbers* kept pace with the increase in pupil numbers. A total of 5 887 teachers were teaching in primary schools in 1994. Of this number, 77 % were female; about half held a primary teacher's certificate and only 47 were unqualified as primary school teachers. Contrary to this, all secondary teachers held a professional teacher's qualification. In 1991, 42 % of secondary school teachers were graduates. In an effort to improve school management, all school principals will be be trained as part of the Education Policy Management and Technology (EMPT) project.

Teacher training is undertaken by UNISWA, SCOT and the three teacher training colleges. The three teacher training colleges had an enrolment of 668 in 1992, compared to UNISWA's enrolment of 220. Three levels of teacher training are offered: the Primary Teacher Diploma, the Secondary Teacher Diploma or Technical Teacher Certificate and the Graduate Teacher Diploma.

The rapid expansion in primary and secondary school enrolments resulted in the construction of schools not being able to keep abreast with the demand for school places in the eighties. The majority of primary schools were built by the community, religious private organizations after which they became government aided schools with the government providing teachers and teachers' salaries, as well as furniture and educational materials. The pupil:teacher ratio in primary schools in 1994 was 33:1 and the pupil:classroom ratio 40:1. In recent years the gap between the demand for classrooms and the supply of new classrooms has narrowed as the ratios quoted earlier indicate. To compensate for the shortage of classrooms, hot seating, church halls or outside classes were used. Shortages of school furniture were more acute. In 1991, there were twice as many pupils as there were desks.

Curriculum developers have been concerned about the relevance of the school curriculum for some time. Both the National Education Commission (1975) and NERCOM (1985) raised the issue of a lack of relevancy and made some firm recommendations to improve the relevancy of the curriculum. Attempts to make education more responsive to socio-economic and manpower needs of the country have unfortunately resulted

FIGURE 2.8
EDUCATION SYSTEM OF SWAZILAND


PREPRIMARY
PRIMARY
SECONDARY
TERTIARY
AGE 6 7 8 9 10 11 12 13 14 15 16 17
PREPRIMARY EDUCATION
1 2 I II III IV V
STANDARDS
PRIMARY EDUCATION
SPCE
JC
I II III
FORMS
V VI
FORMS
JUNIOR SECONDARY
SENIOR SECONDARY
UNIVERSITY DEGREES
Sociology, Arts, Education, Agriculture Economics
Law, Science
UNIVERSITY DIPLOMAS
Adult education, agriculture, home economics, etc
UNIVERSITY CERTIFICATE
Business studies education
PG
UB
WPTC/NTTC Primary teacher training
SCOT Vocational training
College of nursing
Agriculture (university)
WPTC (JSTT) Primary teacher training
SCOT Technician training
College of nursing
Health services training

NOTES

SPCE	Swaziland Primary Certificate Examination
JC	Junior Certificate Examination
	Cambridge Overseas School Certificate Exam (O level)
WPTC	William Pitcher Teacher College
NTTC	Nazarene Teacher Training College
SCOT	Swaziland College of Technology
PG	Postgraduate studies
UB	University study abroad
JSTT	Junior Secondary Teacher Certificate

Source: Ministry of Education, 1994.

in an overloading of the curriculum. The diversification of the curriculum has received specific attention in recent years.

Real progress has been made in this direction at primary school level, but less progress at higher grades. At the end of 1992, about half all primary schools were offering a diversified curriculum. This exposed students to a number of practical subjects such as agriculture, home science, technical and commercial studies. Local teaching materials for primary schools were produced by the National Curriculum Centre (NCC).

Both academic and practical subjects were offered at secondary school level. The proposed prevocational programme will offer academic and prevocational subjects at a number of pilot secondary schools. The prevocational education programme will start with a number of exploratory activities in practical subjects in Forms I, II and III and then gradually narrow the focus in Forms IV and V to more specific skills for distinct vocations.

The need for technical and vocational education has been highlighted by the fact that in 1988 three-quarters of all high-level technical jobs were held by expatriates. (Ministry of Education, 1994) In order to prepare students better for opportunities in the labour market or for self-employment, the Gwamile Vocational and Commercial Training Institute (VOCTIM) was established at Matsapha. The policy of VOCTIM was to survey the needs of industries and to develop courses to satisfy these needs. In 1992, there were 170 students enrolled in eight study directions (Building and Construction, Woodwork, Electrical Engineering, Mechanical Engineering, Motor Vehicle Mechanics, Secretarial Studies and Business Administration). The demand for an expansion of the range and number of courses offered, as well as an increased intake exists.

The Swaziland College of Technology (SCOT) offers both vocational and technical programmes with Junior Certificate and O-level admission requirements. The total enrolment in 1992 was 677 in the following study directions: Mechanical Engineering, Panel Beating, Water Technician, Construction, Basic Engineering, Hotel & Catering, Biomedical Engineering, Motor Mechanics, Accounting, Clerical Studies and Typing, Teacher Training and Woodwork.

The Manzini Industrial Training Centre (MITC) offers courses in ten skills areas and also hosts the Business Management Extension Programme which is aimed at establishing self-employed vocationally trained people in business.

The University of Swaziland was established to produce high-level manpower for the country's development needs. It became an independent university in 1982 and houses six faculties (Agriculture, Commerce, Education, Humanities, Science and Social Science). A total of 1 730 students were enrolled at the University of Swaziland in 1992 and it was expected that this would increase to a total of 2 311 in 1995/96. Nearly 60% of the students were enrolled in studies in the social sciences and humanities. Less than 300 students were enrolled in Science and 373 in Agriculture.

The focus of *adult and non-formal education* is to offer literacy and numeracy training to those who, in their youth, were unable to avail themselves of educational opportunities.

Estimates of adult literacy vary from region to region with the overall literacy rate being the highest in the Manzini region. The literacy rate is also higher for males than that for females. (Ministry of Education, 1994) According to the 1986 census, the adult literacy rate is above the 60 % level. SEBENTA National Institute is Swaziland's most prominent organization involved with adult literacy. In the thirty years of its existence, it has graduated more than 67 000 adults from programmes in siSwati and English. However, SEBENTA's ability to provide literacy training cannot keep pace with the growing demand.

Rural education centres were established with the objective of providing training which would enable people to improve their standard of living and uplift the quality of life of rural Swazis. Popular courses include carpentry, sewing and knitting, vegetable gardens, poultry and pig farming and brick making. Additionally, short courses in community development, health, nutrition, environmental education and home improvement are offered.

Distance education in Swaziland is offered by Emlalatini Development Centre, William Pitcher College's Inservice Teacher Training, the Division of Extramural Service of UNISWA and SEBENTA Adult Literacy Education. The purpose of these institutions is to provide correspondence education and inservice training to students who have been by-passed by the formal school system, as well as to youths, adults and serving teachers.

Recurrent *expenditure* in education has exhibited a steady rate of growth since independence. In recent years, this growth has reached more or less the maximum level of possible expenditure. Expenditure in education in 1991/92 was equivalent to 8,1 % of Swaziland's GDP and represented 28,5 % of the total national recurrent budget. In total, the education sector spent 37,2 % on primary education, 29,3 % on secondary, and 17,9 % on UNISWA. The unit cost per primary school child was E491 compared to E1 577 per secondary school pupil and E19 900 per university student.

Whatever reforms and changes are brought about in the education system, additional budgetary allocations are unlikely. The economic climate in Swaziland is such that government revenues are not expected to grow substantially and expenditure in education already accounts for a very large proportion of government expenditure. Increased cost efficiency and cost sharing will probably require attention in future. Reducing the number of repeaters, increasing the quality of education and consolidating the education system are some of the measures that could be considered.

Significant progress has been made since independence in expanding educational opportunities at primary, secondary and tertiary level, but inadequate facilities, poor rates of progression and declining quality in education continue to reduce the effectiveness of the system. Equity and cost effectiveness are additional cross-cutting issues that concern policy makers. Most of these problems stem from the twin constraints of inadequate financial provision and population growth.

Improving the quality of education is therefore regarded as the main challenge to education. This can be done by improving the internal efficiency and cost effectiveness of the system.

Presently, a project is under way to determine what a good school is and to develop strategies aimed at improving the quality of education at school level. Measures aimed at improving the quality of education include: continuous assessment to reduce the number of repeaters, improving the management skills of headmasters and making the curriculum more relevant.

Measures aimed at meeting the financial challenge of improved efficiency include the rationalization of teachers by combining small classes and increasing teaching hours at secondary school level. A major challenge will be the reduction of unit costs at university level. The first step in this direction was taken in the 1995/96 financial year by retaining the subvention level at the 1994/95 level.

2.5 CONCLUSION

From the case studies discussed it is clear that the sixties and seventies were characterized by rapid expansion in educational enrolment and an increased spending on education. Many African countries were therefore disillusioned when the adverse economic conditions of the mid-seventies and eighties, combined with high population growth rates, stalled educational growth. At the same time many people began to realize that the quality of education had deteriorated.

The financial difficulties and the declining quality of education in Africa are not transitional problems. (Eshiwani, 1986) The problems are essentially related to internal and external factors.

Externally, depressed commodity prices on the international market and the heavy interest burden on debt have both led to serious recessions in developing countries. Low levels of industrialization and productivity make sub-Saharan Africa uncompetitive on international markets and reliant on the export of raw materials and minerals to earn foreign income. The impact of these factors in the budgets of the affected countries is evident.

Internally, educational development and the implementation of education policies have also been negatively influenced by a number of factors:

- The lack of realism of educational policies developed in terms of the availability of resources, skilled manpower for implementation and the social and political characteristics of the country (e.g. taking into account high population growth and slowing down of economies).
- Within a stable political environment (such as Botswana) political forces may enhance policy implementation, whereas political turmoil (as experienced in Lesotho) may disrupt and hamper implementation. Politics, however, has a greater influence on policy formulation when, for example, a leader may announce a policy to gain political advantage knowing (or even not knowing) that the policy cannot be implemented.

- Lack of resources to implement policy is one of the most common factors inhibiting policy implementation in the countries surveyed. Very often this relates to poor planning at the policy formulation stage where the policy makers set targets based on incorrect calculations or do not take full account of the costs involved in the implementation of the policy. The result is that at the implementation phase the resources are simply not available to implement the policy.
- The inefficiency, incompetence and inertia of the administrative structures are common problems. The top-heavy structure of administration is a common problem. (Decision-making is often centralized resulting in long delays that affect the efficiency of the system negatively.)
- Social and cultural factors can create resistance at the implementation stage. Included in this set of factors are gender, ethnic, language, religious and socio-economic considerations. It is not uncommon to find rural people resisting certain changes because they do not believe that they are receiving the same treatment as their urban counterparts.

ENDNOTES

5 The purpose of this chapter is to highlight broad trends found in the countries surveyed. The findings include a discussion of some of the successes and failures of the education system in each country. The interested reader is referred to the detailed reports on each country for more information.

6 For the purpose of the study, only the figures for countries included in the study will be reflected. These figures may differ slightly from those given in the subreports as different information sources were used.

7 Figures in brackets as a percentage of age group.

8 Overaged children included in primary school enrolment figures.

9 Figures in brackets as a percentage of age group.

10 Overaged children included in primary school enrolment figures.

11 At the time of the study the education system was still based on the Report of the First National Commission on Education (1977). The report of the Second National Commission on Education was released in 1993 and the government's reaction to it in April 1994. Little of it had been implemented by January 1995.

12 *Kagisano* means the promotion of social justice, a sense of belonging to the community and the acceptance of responsibility.

13 The percentage of the age cohort not enrolled in primary schools is probably much higher than official estimates. During a previous visit in 1993 it was claimed that 90 % of the age cohort attended school and that the aim of universal primary education had been achieved. According to the census statistics of 1991, this was not the case.

14 The concept of *equity* in this context means that access to educational opportunities and the distribution of education resources must be fair (i.e. individuals should not be disadvantaged because of their economic background, geographical location, gender, ethnic origin, religion or disability). (National Commission on Education, 1993:33)

15 The deficit grew to a massive M719,9m in 1991.

16 The United Kingdom did not view the provision of education as its responsibility in a protectorate.

17 The period from independence to the formation of a one-party state is known as the First Republic; the period of one-party rule as the Second Republic and the present multiparty state as the Third Republic.

18 The *harambee* idea means literally "let us pull together" or helping one another, or self-reliance, or community co-operation and originated in the first speech by Dr Kenyatta on gaining independence, when he said: "We must work harder to fight our enemies - ignorance, sickness and poverty. I therefore give you the call: Harambee! Let us all work hard together, for our country, Kenya."

19 The extended civil war in Mozambique has for many years forced Malawi to export its produce via longer and more expensive routes.

20 The structure of the education system in Malawi is similar to that of Kenya, namely an 8-4-4 system. The eight years of primary education leads to the external Primary School Leaving Certificate (PSLC) which serves as a selection criterion for secondary school. The four years secondary education is divided into two years Junior Secondary Education, leading on to the external Junior Certificate of Education (JCE) at the end of Form II, and two years Senior Secondary Education culminating in the external Malawi Certificate of Education examination at the end of Form IV. Some students may continue with the advanced level courses offered at private schools to prepare them for study overseas, although this is not a popular option. Secondary education is followed by four years post secondary education at technical colleges and the University of Malawi - the latter included the Kamazu College of Nursing, Banda College of Agriculture, Chancellor College and the Polytechnic.

21 The revision of the secondary school curriculum was launched in 1994.

22 MK - Malawi Kwatcha.

23 Apprentices are indentured with a sponsoring company for four years where they receive on-the-job training from experienced journeymen. Of the total four year training, four and a half months (normally three six weeks blocks) are spent in formal training at a polytechnic or technical college. Minimum entrance requirements are at least five O-level subjects.

24 King.

CHAPTER 3

DONOR AID TO AFRICA

> *Development cannot be considered as a series of disconnected sectoral activities or purely technological choices. It implies global coherence and the political will to bring about social change.*
>
> (Paul-Marc Henry)

3.1 INTRODUCTION

Donor aid is a recent development in the world. It originated in the era following the Second World War when massive funds were needed for the reconstruction of the economies of the world. During the fifties, it was recognised that the gap between developed and developing countries had widened and that developing nations needed assistance with their development efforts. This conviction led to the formation of organizations such as the Development Assistance Committee (DAC) of the OECD and the launching of the First Development Decade (1961-1971) by the United Nations in 1961.

In looking back at this first decade of assistance some broad trends can be identified[25]. According to the OECD (1973), this decade was marked by an appreciable increase in the financial flow to developing countries, but, at the same time, by a substantial decrease in terms of the GNP share of donor countries given to development assistance. In 1962 DAC countries contributed 0,52 % of their GNP to development aid. In 1970 this was down to 0,34 % of their GNP. At the same time there was a decline in the volume of grants and an increase in the share of loans (in 1962, 21 % of all aid was in the form of loans; by 1970 loans averaged 49 % of all aid). During this time a concessional element was introduced to loans. There was also a shift from bilateral aid to multilateral aid as DAC countries increased their financial contribution to multilateral organizations. The first decade also saw a gradual institutionalization of aid policies and the establishment of aid agencies, such as ODA, USAID, SIDA, etc.

The Second Development Decade (1971-1981) was strongly influenced by the world oil crisis of the early seventies, an increase in the external debt of developing countries and the world economic recession. The result was that the flow of aid (in real terms) to developing countries decreased as the economies of the developed world slowed down. Interestingly enough, by 1979 DAC countries still allocated on average 0,34 % of their GNP to development aid. Again, loans were gaining in their share of development aid.

A new development was that private banks in developed countries increased their share in development aid as credit was extended to developing countries to pay for their imports. These, however, took the form of non-concessional aid. Another important trend of the seventies was the increase in multilateral aid and the emergence of conditionalities attached to development aid. The latter was generally aimed at structural adjustment programmes in developing countries. (See King, 1993.) OPEC also entered the development aid arena during the seventies.

Although there was something of a slump in the flow of donor aid to the Third World in the seventies, recent trends of the eighties suggest a renewed interest in educational investment - at least at the level of rhetoric. This interest has been stimulated by a burgeoning literature on the links between education, human resource development and economic growth (see Psacharopoulos, 1990) and particularly by the recognition that the education systems of many countries in sub-Saharan Africa are rapidly eroding in the face of economic decline. (Mundy, 1994; World Bank, 1988; UNESCO, 1993) The amount of donor aid needed for education in sub-Saharan Africa is estimated at US$15 billion for the period 1990-2005 (Colclough, 1994) compared to the US$2,2 billion allocated in the period 1980-1989.

3.2 AID TO AFRICA

Despite being classified as the poorest region in the world, sub-Saharan Africa obtained only 11,8 % of World Bank funding in 1991. Africa, in general, does not feature very high on donor countries' agenda. The US$2,25 billion allocated to Africa by the World Bank is dwarfed by the sums offered by the United States and Europe to Russia and its former Eastern European allies. (Hopkin, 1994) The World Bank (1990), however, claims that, relative to its population, Africa has commanded a sizeable share of international donor aid. The annual allotment of such aid to sub-Saharan Africa for all purposes, education included, is equivalent to about US$19 per inhabitant compared to US$8 per inhabitant in other developing countries. (World Bank, 1990)

Although data on aid flows are not notable for their accuracy, rough estimates of donor aid to Africa and to the countries included in the study are given in Tables 3.1 (p. 106) and 3.2 (p. 106).

TABLE 3.1
DONOR AID TO THE EDUCATION AND TRAINING SECTORS IN AFRICAN COUNTRIES
(1981-1983 AVERAGE)

DONOR AID SOURCE	OVERSEAS FELLOWSHIPS ($000 000)	OTHER ($000 000)	TOTAL ($000 000)	TOTAL AS % OF ALL AID TO AFRICA
OECD and OPEC [26]	168,2	617,3	785,5	88,1
United Kingdom [27]	15,7	24,2	39,9	4,1
United States	7,0	29,3	36,3	6,5
Germany	4,5	14,7	19,2	1,7
Sweden	0,3	23,0	23,3	1,5

Source: World Bank, 1988: 148.

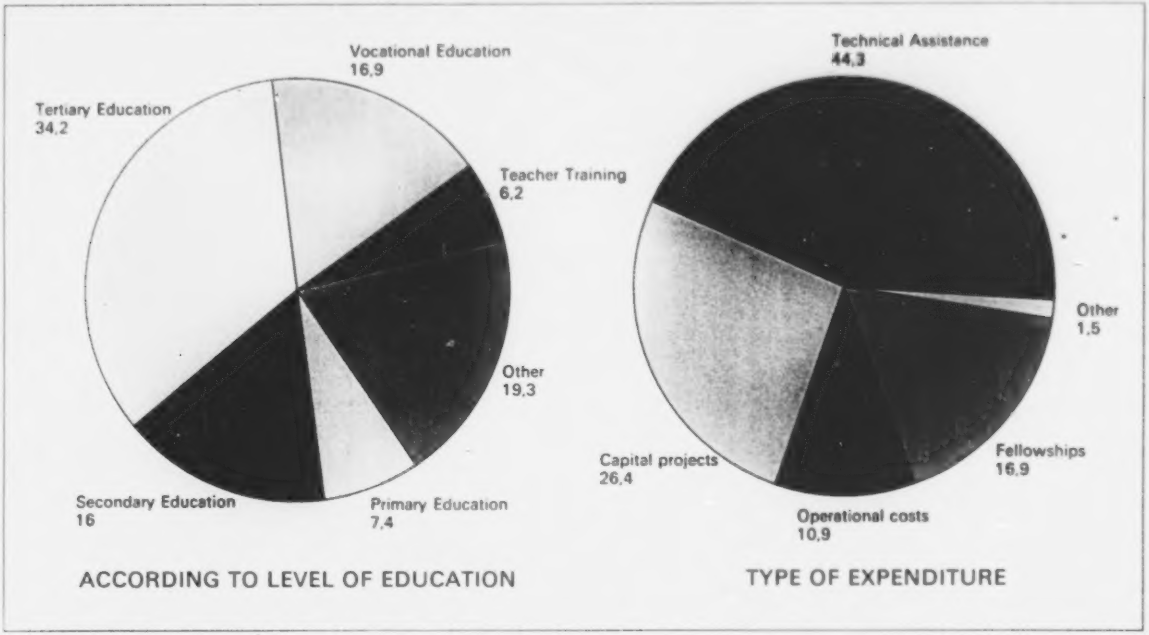
TABLE 3.2
DONOR AID BY RECIPIENT COUNTRY (1981-1983)

COUNTRY	NON-CAPITAL ($000 000)	AS % OF RECURRENT BUDGET	CAPITAL ($000 000)	AS % OF CAPITAL BUDGET	TOTAL AID
Malawi	10,0	25,2	7,8	53,6	17,8
Tanzania	30,7	11,9	8,1	18,4	38,8
Kenya	124,5	26,9	-	-	124,5
Zambia	21,8	10,9	2,6	51,8	24,4
Lesotho	9,5	27,9	2,6	21,5	12,1
Zimbabwe	10,4	2,2	6,5	31,8	16,9
Swaziland	8,7	25,3	1,6	19,9	10,3
Botswana	12,4	20,7	5,3	35,5	17,7

Source: World Bank, 1988: 149.

Figure 3.1 (p. 107) reflects the distribution of funds according to the level of education and category of expenditure

FIGURE 3.1
DIRECT EDUCATION AID TO AFRICA (1981-1983 AVERAGE)



ACCORDING TO LEVEL OF EDUCATION

TYPE OF EXPENDITURE

Source: World Bank, 1988: 104

THE CANADIAN INTERNATIONAL DEVELOPMENT AGENCY

The extent of which a country's own agenda may shape its donor aid policy may be further examplified by looking at the role of the Canadian International Development Agency (CIDA).

CIDA was established in 1968 with the aim of helping the poorest of the poor. It has always been involved in a number of African countries and, although regarded as a small player in the region compared to other donor countries, remained the ninth largest bilateral donor in sub-Saharan Africa. (Mundy, 1994) Table 3.3 shows the total amount of Canadian aid given to seven southern African countries in 1992/93. The growth of Canadian aid within southern Africa from the mid-1970's had much to do with Canada's search for a politically moderate response to Apartheid in South Africa and became something of a cloak for the Canadian government's unwillingness to take stronger economic sanctions. In the eighties Canada took a more pro-active stance and further increased the level of disbursements to countries in the southern African region. (Mundy, 1994) Contrary to the policy of other donor aid countries, Canadian aid in the region has seldom carried direct conditionalities. On the whole, CIDA's involvement in structural adjustment in southern Africa has been neither consistent nor particularly strategic.

TABLE 3.3
CANADIAN OVERSEAS DEVELOPMENT AID TO SOUTHERN AFRICA (CDN$ '000)

COUNTRY	AID TOTAL IN 1992/93
Botswana	2 630
Lesotho	2 694
Malawi	12 137
Swaziland	3 065
Tanzania	32 800
Zambia	29 618
Zimbabwe	32 617

Souce: Mundy, K. 1994. Canadian aid and education in southern Africa.

According to Figure 3.1 the distribution of direct aid to Africa is heavily skewed towards higher education. During 1981-1983 approximately 7 %

of all aid went to primary education. This situation may have changed in the meantime as there seems to be a greater emphasis in recent years on primary education. Figure 3.1, when analyzed, provides disturbing information in that when expenditure is broken down per category, the majority of funds went towards technical assistance (providing foreign experts or, in essence providing employment opportunities for their own professionals) and fellowships - the so-called "soft aid". These results, according to the World Bank (1988), constitute evidence that aid in the past has either been misdirected or unproductive.

3.3 DONOR AID TO THE COUNTRIES STUDIED

3.3.1 Influence of donor aid on education in Botswana

Hopkin (1994), in his analysis of donor aid to Botswana, found that aid to education does have a high profile in Botswana but that Botswana is not favoured in this respect. A number of major donors have been involved in Botswana (USAID, ODA, SIDA, GTZ, CIDA, AIDAB, the World Bank and UNESCO). These major role players have divided the turf amongst themselves so that very little duplication and overlap occur.

The achievements attained through donor assistance are numerous. Revised and expanded curricula have been developed with support from USAID and ODA. These two bodies have also assisted in the changes brought about in teaching methods and the creation of in-service training and teacher training programmes. The new Artisan Training Act (1993) is the direct result of German involvement in technical education. The University of Botswana also gained much through donor assistance for the expansion of facilities and the development of the university and university courses.

From 1996 Botswana will no longer be classified as one of the least developed countries because of its high economic growth. This should not affect Botswana's ability to attract loans, but it may no longer qualify for the same concessional terms. It may, however, result in reduced aid to Botswana. There are already signs that donor aid is diminishing and that certain smaller donors are withdrawing (CIDA and DANIDA have already indicated that they are withdrawing and USAID has cut down on its funding).

A vital element of aid to a developing country is the efficiency, prudence and integrity of the civil service, as well as the political stability of the country. Botswana has a proven track record in this regard and all evidence points to the fact that the aid given has been used for the purposes intended.

Botswana has also demonstrated the determination to incorporate aid into its own developmental plans, thereby ensuring that the deployment of aid and the results are "owned" by Botswana. (Hopkin, 1994: 397) An interesting characteristic of aid to Botswana is that it has normally been awarded on terms determined by Botswana.

One of the problem areas identified in an earlier report (Nieuwenhuis, 1993) was that Botswana seemed to be very dependent on expatriates at middle management level. For donor countries this has meant that there has often been a lack of local qualified counterparts to collaborate on a project. Botswana has been criticized for not always having local officials capable of efficient decision making and minimizing bureaucratic complexities.

From interviews conducted it was clear that donor influence in educational development had been profound. Botswana's reliance on foreign expertise, especially at the initial stages of projects, and the fact that many middle level management posts are often occupied by expatriates may create the impression of donor dominance or hegemony. This is not the case. Many examples were cited where Botswana had refused foreign aid because it had not met the needs of Botswana or it had not been in line with perceived development aims. (Also see Hopkin, 1994 and Meyer, Nagel and Snyder, 1993.)

3.3.2 Donor involvement in the provision of education in Lesotho

Lesotho has always been dependent on donor assistance in the development of its education system. Factors such as political instability and an escalating trade deficit have necessitated donor aid. At present, approximately 90 % of its education budget for capital costs (buildings, vehicles, furniture) is financed through donor funding.

The Planning and Research Unit of the Department of Education deals specifically with donor co-ordination. The fact that a variety of donor agencies (IMF, EEC, USAID, ODA, World Bank, the British Council, German, Danish and Irish governments) have been involved in the financing of educational programmes placed the department at risk of fragmenting educational development in the country. This could be attributed to the uneven distribution of funding among the various education sectors.

Concern was also expressed at the inflexibility of the World Bank in implementing funds made available for educational purposes. This may be illustrated by the following example. Since independence more than 90 % of all schools have been church owned. The Fifth Five Year Plan supported the expansion of existing schools rather than the building of new schools. The World Bank offered to finance this expansion *provided that school management councils be established at all schools.* The Ministry of Education, acting as broker between the World Bank and the churches, met with resistance from the churches on the establishment of these councils as they were regarded as impracticable for the churches. The churches supported the idea of advisory bodies at school level which, in turn, would report to a management council responsible for a number of church-run schools. This was not acceptable to the World Bank and a deadlock developed which delayed the financing of projects.

Lesotho is, and for the foreseeable future will remain, dependent on donor aid and assistance for the development and implementation of its educational system. This implies that its education development programmes must be developed in collaboration and consultation with donor aid countries and agencies.

3.3.3 Contribution of donor aid to educational development in Zambia

The government of the Second Republic was unpopular with many of the traditional donors operating in Zambia. These donors were mainly democratically inclined and less willing to increase their support annually and thus entrench the stronghold of a one-party state. Nevertheless, the poor performance of the Zambian economy in the seventies and eighties had made it very dependent on donor aid to meet its recurrent commitments. Recently, with the introduction of multiparty democracy, there has been an upsurge in donor funded projects. This has also benefitted the education sector.

During the early eighties the total donor investment in primary education was relatively small compared to the amount of aid that was channelled to the university sector. (See World Bank, 1988; Chiñeyu, 1995.) In recent years the picture in Zambia has changed significantly. This was mainly the result of the emphasis of FINNIDA and SIDA on support for basic education. (Ministry of Education, 1992) Important areas to be addressed with the help of donors will be the rehabilitation of the primary education sector through projects aimed at upgrading and building schools and distributing learning materials to these institutions.

Zambia faces a formidable challenge in its efforts to restore quality and to move towards universal primary education. It is clear that Zambia will have to rely on foreign aid to meet this challenge. Presently, the priorities of donor assistance do not differ from those of the government. The strategy is to address infrastructure rehabilitation and to improve the quality of primary education through allocating resources to schools, improving teacher qualifications and providing classrooms.

Problems as far as the flow of donor aid is concerned include the inability of Zambia to fund the collateral part of their contribution to projects; find suitable counterparts to work on the projects and sustain projects once donor aid ends.

3.3.4 Critical evaluation of donor involvement in Tanzania

Donor aid to the education sector in Tanzania should be understood against the background of donor assistance to Tanzania in general. During the last two decades more than US$13 billion of external assistance has been disbursed to Tanzania. In 1990 alone, US$1,1 billion was allocated to Tanzania. (Bol, 1995) Approximately 75 % of all aid was in the form of grants, while loans were highly concessionary (0,5 % interest with 50 years maturity). It could be said that Tanzania was indeed favoured as a donor recipient. Bol (1995), however, points out that, given the size of its population, Tanzania did not receive as much per capita support as Botswana. The "preferential" treatment of Tanzania by donor aid countries was a precursor to an immense aid dependency which directly opposed the ideals of self-reliance proclaimed by Nyerere.

Presently, aid accounts for more than 40 % of the country's GDP and finances over two-thirds of its imports, 80 % of the development budget and 30 % of its recurrent budget.

This dependency on aid is also the result of the poor performance of the economy of Tanzania.

The pattern of external assistance has altered in several ways since the early period of independence. External funds have changed from grants to loans and have diversified as sources of foreign aid changed. This trend may be attributed to the policy of the government (i.e. the establishment of one-party rule and nationalization). The British contribution, for example, dropped from 96 % at independence to 6 % in 1966/67. In 1966/67 the largest donor was China who contributed 40 % of the total development funds. Since the seventies donor support has come predominantly from Scandinavian countries (SIDA, DANIDA, NORAD and FINNIDA). This may in part be attributed to the fact that these socialist-oriented countries supported the socialistic ideals of Tanzania.

Donor assistance to the education sector increased from approximately US$29 million in 1991 to US $38 million in 1992 and decreased slightly to US$36 million in 1993. The subsectors receiving most donor support during this three-year period were secondary education, vocational education and tertiary education. The percentage share of support for secondary education increased from 19 % of the total allocation to 30 % in 1993. Primary education, although receiving very little donor support, increased its share from 2 % in 1991 to 8 % in 1993. At the same time, support for tertiary education remained at about 19 % of the total allocation.

Vocational education and non-formal education lost some of their share of donor support. The three major donors to education in Tanzania during the period 1991 to 1993 were Denmark, Norway and Sweden.

Although Tanzania is highly dependent on donor aid for educational development, donors and recipients share some scepticism about the value of donor aid. (Mosha, 1995; Kiernen, 1995) It is evident that while donor aid was significant, it did not always meet stipulated national goals, as it was often concentrated in subsectors and projects of the donor agency's choice and preference rather than those of the government. (Buchert, 1994)

Furthermore, there seemed to be an overlap of donor activities and a lack of focus and co-ordination. Currently, there is an attempt on the part of donors to set up a combined forum to negotiate with government and to undertake projects in a more co-ordinated way. Donors also experience problems with inefficient management and decisionmaking in the Tanzanian government which results in delays and added costs. Finding suitable counterparts to assist with projects, generating the will to sustain projects and getting local support and co-operation in communities are some of the other problems experienced.

The recipients, for their part, see donors as promoting their own agendas and priorities and not those of their country. Many of the projects identified and supported do not serve the community in the long term as they cannot be sustained through local funding. The amount of funds invested also seems to be too little to make the necessary impact. Added to this is the fact that a large percentage of the funds invested by donors returns to their own pockets.

For example, salaries and allowances of staff from the donor country are included in the budgeted amount, and materials are purchased from the donor country even though local materials are available.

3.3.5 Contribution of donor aid to educational development in Kenya

In 1979, a total of US$1,686 billion was allocated by donor aid to Kenya. Of all the donor aid received, 7,0 % was directed at education. The largest bilateral donors to education in Kenya were Canada, Denmark, Germany, Japan, the Netherlands, Norway, Sweden, Switzerland and the United Kingdom. Aid to education in Kenya in 1979 took the form of grants rather than loans. An analysis of these grants shows that they favoured technical assistance and the provision of experts. The cost of sending these people to Kenya was included in the total amount of the grant. The loans secured were mainly used for the construction of classrooms and facilities.

A striking feature during the seventies was the volume of funds disbursed to technical and vocational education which corresponded with the shift in focus toward technical and vocational education. Apart from a loan obtained from the World Bank to improve primary education, very little assistance was secured for primary education.

However, it was political rather than educational events that brought about a major change in the direction and flow of donor aid to Kenya. A review of the political context of Kenya revealed that during the eighties Kenya was internationally criticised for its human rights' record. In 1990 the strong suppression of opposition in Kenya led to multilateral and bilateral creditors suspending aid (totalling nearly US$1 billion) to Kenya, pending the acceleration of both economic and political reforms. Donors specifically emphasized the need for an improvement in Kenya's human rights' record.

By 1993, funding had still not resumed and indications were that some of the donors would not return to Kenya even though multiparty elections had taken place in December 1992.

Early in February 1995 both President Daniel arap Moi (KBC, 2 February 1995) and the Minister of Education (Daily Nation, 1 February 1995) appealed to the international community to assist Kenya with its development plans. As far as could be determined only SIDA, JICA, IFAD and UNESCO were active in Kenya as donors, but these funds were mainly aimed at the agricultural sector and not at educational projects. The latest loan secured from IFAD (KBC, 6 February 1995), for example, was aimed at agricultural projects in western Kenya.

3.3.6 Donor aid for education in Malawi

In the years that followed the independence of Malawi, the United Kingdom played a major role in terms of donor aid to Malawi and has remained an important source of funding ever since. Similarly, South Africa has been a significant source of assistance to Malawi, particularly in providing finance for the new capital of Lilongwe.

In contrast to its neighbours, Malawi pronounced its commitment to a free market system and lured a different set of donors to invest in Malawi. Its priorities were aimed at agricultural and industrial development and donor aid seems to have followed these priorities.

In the eighties, multilateral organizations replaced bilateral donors as the main source of foreign funding with the IDA becoming the leading multilateral creditor. Other donors included the EEC, France, CIDA, USAID, GTZ, DANIDA, ADB and the World Bank.

The drought of 1979-1982 marked a major turning point in Malawi's economic development. For the first time Malawi was faced with a budget deficit which forced the government to resort to non-concessionary borrowing from banks to help finance the budget deficit. The result was that debt servicing rose to 41 % of the total export earnings by 1985. Funds secured in the late eighties were primarily aimed at increasing the productivity of manufacturing in general and manufactured exports in particular. In real terms, however, foreign aid and assistance to Malawi declined sharply between 1980 and 1987.

The standing of Malawi as a recipient of donor aid declined in the eighties mainly as a result of the abuses of human rights by the government of President Banda. Consequently, Western donor nations suspended all but urgent humanitarian aid to Malawi in mid-May 1992. The pressure exerted by bilateral and multilateral donor aid agencies, as well as internal and external diplomatic pressure forced Dr Banda to concede to the pressure to hold a referendum on the introduction of multiparty democracy. Although the government continued to act against opposition, multiparty elections were held in 1994 and Bakili Muluzi was elected as president. With the new government in place, efforts were made to restore donor confidence and to lure donor assistance back to Malawi.

As far as aid to education was concerned, it was evident that support for this sector had always been small in comparison to other sectors of the economy -.education received approximately 9 % of aid in the seventies. Aid directed towards education was used for improving technical and vocational education and higher education.

In recent years, support for education was primarily geared towards basic education. Projects included the upgrading of primary schools, the production and distribution of textbooks and curriculum development work. There was a definite move away from support for technical and vocational education and the support for higher education also dwindled.

3.3.7 Donor aid for education in Swaziland

Compared to other African countries studied, Swaziland was less favoured as a recipient of donor assistance. It was also evident that Swaziland was less dependent on foreign assistance for development programmes and not at all for meeting its recurrent expenditure needs. However, the fact that Swaziland is a low-income country does imply a shortage of adequate human and financial resources within the country, thus necessitating foreign assistance.

Foreign aid in the form of loans predominates. Loans from multilateral organizations (IBRD, Arab League, IDA, ADB, IMF, IFAD) constituted 48 % of the total foreign debt of Swaziland in 1991, while bilateral loans (UK, Germany, Denmark, USA, Canada) made up 49 % of foreign debt. The ADB and World Bank were the major multilateral sources of loans, while Germany and the UK were the main bilateral lenders. (MEPD, 1993)

In terms of receiving international assistance, education has remained a priority area. In 1988, about 42 % of all technical assistance received was in the area of education and human resource development. The technical assistance received was mainly in the form of voluntary teachers. Similarly, nearly 30 % of all external capital assistance was allocated to education.

Some of the larger donors involved with educational development in recent years included the USAID, EEC, World Bank and ADB. The World Bank contributed substantially to the construction of schools in the seventies and eighties and in recent years showed a renewed interest in education sector projects. USAID has been involved with the Education Policy Management Technology project (EPMT) under the auspices of which continuous assessment in primary schools was introduced with a corresponding input in planning and training of teachers and school principals. Recently, a E60 million loan was signed with the ADB aimed at the introduction of prevocational education in secondary schools.

3.4 CONCLUSION

Given the magnitude of donor aid to Africa, the obvious question which concerns the effectiveness arises.[28] At the same time the "what if aid had not been given?" question cannot be avoided. As far as the latter is concerned, it could be argued that, at the macrolevel, apart from providing external resources, foreign aid did impact on government policy in African countries by forcing governments to liberalize their economies (see Zambia, Tanzania, Kenya) and adopt measures aimed at economic restructuring and adjustment (e.g. Malawi and Zimbabwe). At the same time, from an investment point of view, it would seem reasonable to expect that the average annual return on investment should be in the region of 10%. This has not nearly been attained in any of the African countries studied.

Although many of the countries studied were highly dependent on donor aid for educational development, donors and recipients share some scepticism about the value of donor aid. It is evident that while donor aid was significant it did not always meet national goals, as it was often concentrated in sub-sectors and projects of the donor agency's choice and preference rather than those of the government. (Buchert, 1994) Many countries (like Zambia and Tanzania) have never learnt to reject projects that do not meet their own priorities. (See Bol, 1995.)

DUTCH DISEASE

Bol (1995) draws attention to what is called the "Dutch disease" in discussing the concept of "fungibility". Fungibility refers to the fact that what a donor actually finances is not its own project, but that which the recipient can now do with its own funds released through the support secured. The "Dutch Disease" refers to the unintended implications of foreign aid which may lead to unwanted effects. The large inflow of foreign exchange through aid may appreciate a country's currency, thereby reducing its export competitiveness and frustrating domestic exporters. At the same time, aid increases domestic incomes and therefore domestic demands for goods and services. This, in turn, increases the price of domestic goods and services and causes a shift of producers away from previous export goods to the domestic products that are now more attractive thereby reducing the ability of the country to earn foreign exchange through sustained exports.

An analysis of donor involvement in Africa often displays an overlap of activities and a lack of focus and co-ordination. Dlamini and Dlamini (1990) stressed the importance of developing a comprehensive programme of donor support and bringing together and pooling the resources of multiple donors. The UNICEF plan of action for the development of basic education in Swaziland (1991-1995) was modelled on such an approach and was aimed at addressing the basic learning needs of children, women, the youth and adults. Presently, there is an attempt on the part of donors in Tanzania to set up a combined forum to negotiate with the government and to undertake projects in a more co-ordinated way.

Donors also experience problems with inefficient management and decisionmaking in African governments which result in delays and added costs. Finding suitable counterparts to assist with projects, generating the will to sustain projects and getting local support and co-operation in communities are some of the other problems experienced by donors.

The recipients, on their part, see donors as promoting their own agendas and priorities and not those of the country that they are supposed to be assisting. Many of the projects identified and supported do not serve the community in the long term as these cannot be sustained through local funding.

The volume of funds invested were perceived as being too little to make the necessary impact. Added to this was the fact that a large percentage of the funds invested by donors returned to their own pockets. For example, salaries of consultants and staff from donor countries as well as their allowances were included in the budgeted amount, while material was purchased from the donor aid country even though local materials might have been available.

Projects supported by donor aid countries (especially during the seventies) revealed elements such as poor and hasty preparation, projects too large and complex, inadequate government support, lack of manpower, low degree of sustainability, unplanned handing over, too donor-driven and low visibility. Combinations of these characteristics contributed to some projects being described as dismal failures or mistakes.

Another stumbling block to the effectiveness of donor aid was the lack of interest in the projects funded. This lack of interest in the effectiveness of a project, could have lain with both the recipient as well as the donor. In a certain sense, politicians and donor bureaucrats have a specific donor budget to dispense of and would preferably opt for high visibility projects that would improve the image of their country without being concerned about the effectiveness of the investment. On the other hand, sometimes where recipients are politicians they tend to accept projects irrespective of the potential value or result of the project as long as they stand to gain short-term political benefit.

ENDNOTES

25 Although it is well known that technical and other assistance was rendered by the former Soviet Union and its allies, information on the amount of assistance and the projects funded is not readily available. For this reason the focus will primarily be on OECD, OPEC and other bilateral aid from Western nations.

26 Mainly in the form of concessional loans.

27 Countries selected for the purpose of the table are those that are main donor aid sources to the African countries included in this study.

28 At a recent conference on *Aid Effectiveness in Tanzania* a number of evaluation reports on aid effectiveness were received. Some of the arguments raised are repeated here.

CHAPTER 4

POLICY OPTIONS FOR EDUCATIONAL DEVELOPMENT IN AFRICA

"*What goes on outside the school is far more important than what goes on inside because it influences and shapes what goes on inside.*"

(Sadler's words in 1900 - as quoted by Watson, 1994)

4.1 INTRODUCTION

Educational policy cannot be conceived nor developed in isolation from the macrocontext in which it operates. (Watson, 1994; Nieuwenhuis, 1990) Developing guidelines for the restructuring of education would be fruitless if it did not take into account essential economic, political, demographic, geographical, social and labour issues. These determinants operate at national and international level. Figure 4.1 (p. 125) graphically illustrates the factors influencing the development of an education system at national level.

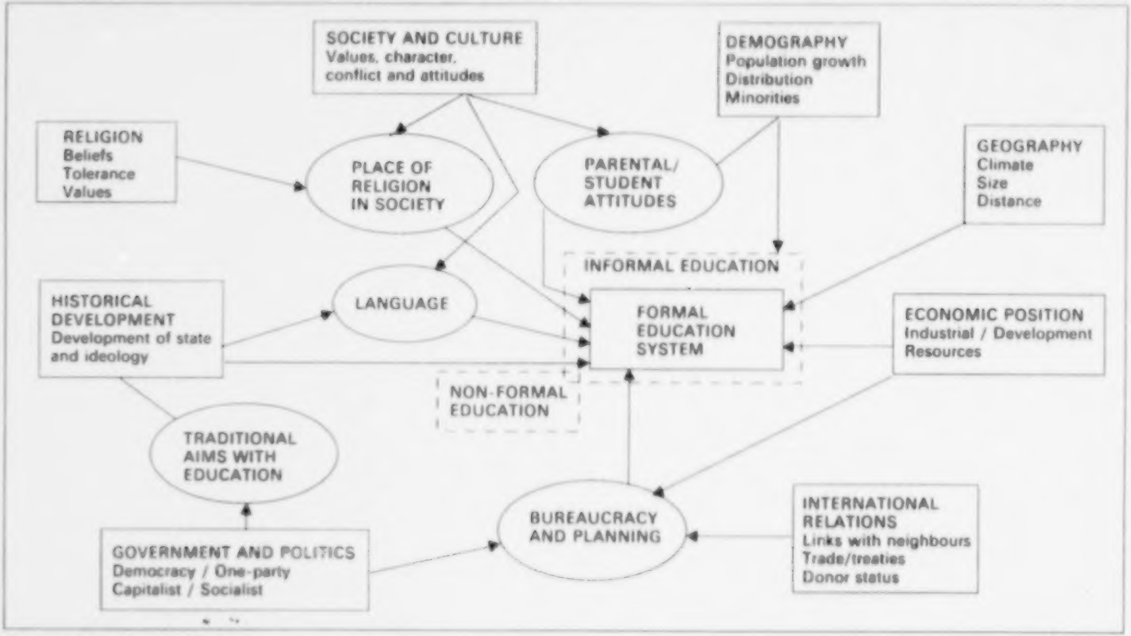
The basic assumption underpinning Figure 4.1 is that an education system is the outcome of a multiplicity of historical, social and political factors and forces interacting in such a way that the emerging system is in a constant mode of gradual evolution. For this reason, any existing education system, whatever its origins, imposes real limits upon the changes that any stakeholder group or decision-making body can bring about. (See Archer, 1984; Lee, 1990.) Apart from the sociopolitical, economic and historical factors, Figure 4.1 also allows for influences from the international community that impact on the education system.

Toffler (1980) and Naisbit (1983) referred to the globalization trend that was sweeping the world. This is clearly visible in education, especially in the developing countries of sub-Saharan Africa where megatrends dictated by UNESCO, International Conferences and the World Bank impacted heavily on the direction of educational development. One sees these trends emerging from conferences such as the Conference of African States on the Development of Education in Africa (1961), the All African States Conference held in Addis Ababa in 1967, the Jomtien Conference on Education for All (1990) and the 1976 UNESCO Conference on Technical and Vocational Education. The impact of these trends on educational policies was discussed in Chapter 2 and is graphically illustrated in Figure 4.2 (p. 126).

The reasoning in Figure 4.2 is that international demographic trends and patterns of migration, as well as literacy rates and educational levels across countries impact on the flow and availability of labour (labour mobility) between countries. The influx of labour into a country can (as happened in South Africa with the discovery of diamonds and gold), change patterns of employment, social relations and the demand for certain types of skilled labour. This, in turn, may influence the curriculum and education system.

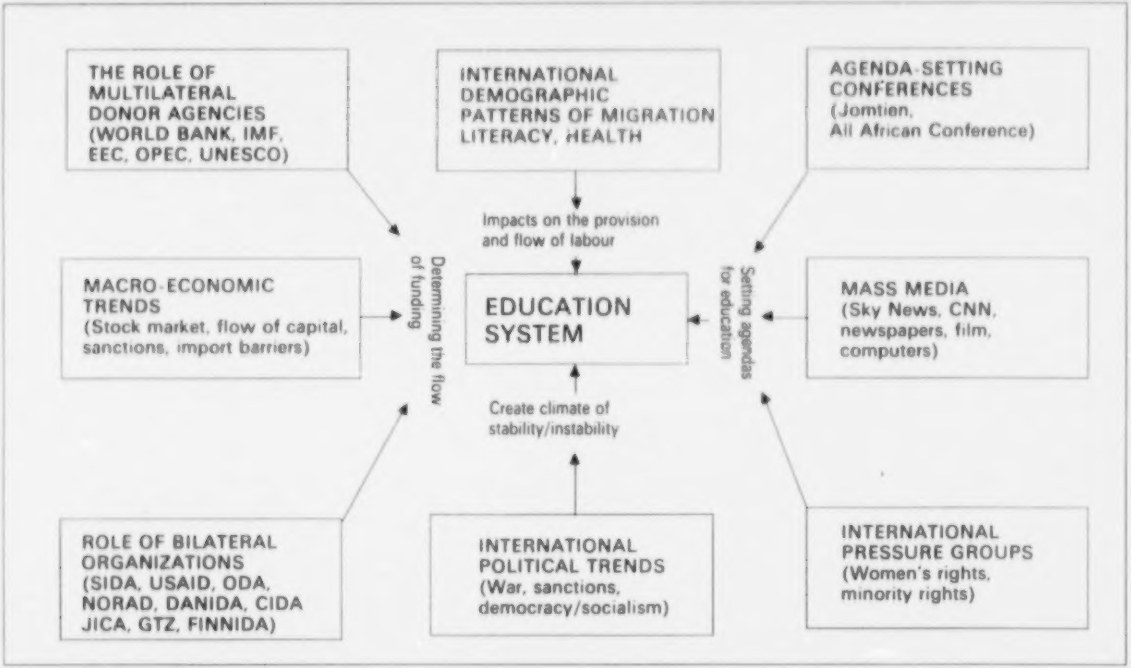
Migration and population movements, however, are often the result of larger or even international political events. In recent years Malawi, Tanzania, Swaziland and other countries had to play host to refugees from neighbouring countries destabilized through internal conflict and civil wars. These refugees not only increased the pressure on the provision of education, but also on the limited employment opportunities in host countries. In the country-specific studies undertaken, it was found that

FIGURE 4.1
DETERMINANTS OF AN EDUCATION SYSTEM


SOCIETY AND CULTURE
Values, character, conflict and attitudes
DEMOGRAPHY
Population growth
Distribution
Minorities
RELIGION
Beliefs
Tolerance
Values
PLACE OF RELIGION IN SOCIETY
PARENTAL/ STUDENT ATTITUDES
GEOGRAPHY
Climate
Size
Distance
INFORMAL EDUCATION
HISTORICAL DEVELOPMENT
Development of state and ideology
LANGUAGE
FORMAL EDUCATION SYSTEM
ECONOMIC POSITION
Industrial / Development
Resources
NON-FORMAL EDUCATION
TRADITIONAL AIMS WITH EDUCATION
BUREAUCRACY AND PLANNING
INTERNATIONAL RELATIONS
Links with neighbours
Trade/treaties
Donor status
GOVERNMENT AND POLITICS
Democracy / One-party
Capitalist / Socialist

Adapted from: Watson, 1994

FIGURE 4.2
INTERNATIONAL INFLUENCES THAT SHAPE EDUCATIONAL POLICIES


THE ROLE OF MULTILATERAL DONOR AGENCIES (WORLD BANK, IMF, EEC, OPEC, UNESCO)
INTERNATIONAL DEMOGRAPHIC PATTERNS OF MIGRATION LITERACY, HEALTH
AGENDA-SETTING CONFERENCES (Jomtien, All African Conference)
Impacts on the provision and flow of labour
MACRO-ECONOMIC TRENDS (Stock market, flow of capital, sanctions, import barriers)
Determining the flow of funding
EDUCATION SYSTEM
Setting agendas for education
MASS MEDIA (Sky News, CNN, newspapers, film, computers)
Create climate of stability/instability
ROLE OF BILATERAL ORGANIZATIONS (SIDA, USAID, ODA, NORAD, DANIDA, CIDA JICA, GTZ, FINNIDA)
INTERNATIONAL POLITICAL TRENDS (War, sanctions, democracy/socialism)
INTERNATIONAL PRESSURE GROUPS (Women's rights, minority rights)

international trends towards the democratization of countries contributed to the introduction of multiparty democracy in a number of African countries.

These regional and international political events also govern the flow of finances from multilateral, bilateral and other funding agencies. In Chapters 2 and 3 it was indicated how multilateral organizations used their financial power to bring about economic restructuring and changes with regard to human rights issues. The fact that donor aid, for example, was suspended to a number of African countries had a direct impact on the provision of education in those countries. In other instances, countries became so dependent on donor aid that they could not meet their recurrent budget commitments.

The globalization of education is often witnessed at international conferences which set educational agendas. International pressure groups and the mass media, on the other hand, may also play a significant role in determining the direction of the development of the education system in a country.

The implications of Figures 4.1 and 4.2 on setting the agenda for educational development in Africa are significant. Firstly, as Lee (1990: 1) indicated, there "...are no coups d'etat in education". Whatever agendas are set, national systems of education in Africa will be slow to respond and will gradually change to meet those challenges. This fact was clearly demonstrated during the investigative visit to African countries. The majority of the countries set the goal of curriculum reform on gaining independence, yet many failed to change the curriculum to meet their own local needs. The same applies to changing the structure of the education system. In the majority of cases, the education system was still very much the same as that inherited from the colonial era.

A second major implication is that Africa will have to take cognisance of international trends in education and will most probably have to follow suit. Donor aid countries (and specifically the World Bank and other multilateral funding agencies) are already exerting pressure on countries to improve the quality of education, to focus on basic education and to adopt measures aimed at increasing cost sharing in education. These ideals formed an important part of the development plans of a number of countries visited.

4.2 SETTING THE AGENDA FOR EDUCATIONAL DEVELOPMENT IN AFRICA TOWARDS THE 21st CENTURY

A number of World Bank reports (1988; 1994), the *Report of the Education Task Force* of Tanzania (1992), Watson (1994) and Mosha (1993), as well as national development plans outlined some of the challenges faced by countries in their efforts to restructure their education systems to meet the demands of the 21st century. From the observations made during the study a number of other factors were added. At the same time, it must be stressed that these are merely broad indicators which could be extended or refined:

4.2.1 Economic/political challenges

(1) Structural adjustment of the economies of sub-Saharan Africa

In recent years the IMF and World Bank have continually expressed the importance of structural adjustment in African countries to current demographic and fiscal realities. Apart from the liberalization of the economy and political processes, structural adjustment also implies the scaling down of the bureaucratic structures in these countries. These measures are seldom popular and often lead to increased hardship in the short term. This may be exemplified by the Zambian experience.

Multiparty elections were held in 1991 in Zambia in which Frank Chiluba was elected president with an overwhelming majority. Since his election

President Chiluba has had to adopt stringent economic measures in an attempt to implement the structural adjustment programme of the IMF and to set Zambia on the road to economic recovery. These measures increased the hardships of the people and dissatisfaction with the government mounted. Numerous reports of conspiracy against the government have been released since late 1994. (See *The Zambian Times* of 9-15 January 1995.)

Structural adjustment also affects education. The World Bank (1988) proposed that structural adjustment in education should take two forms - diversifying the sources of finance (which include the promotion of NGO's) and containing unit costs in education.'

(2) Moving from a controlled or confined socialist to an unconfined market economy

The experience of Africa points to the general failure of controlled economies in generating the required economic development. Free enterprise/open market thinking will probably tend to dominate economic planning in future and will see countries moving towards more of a mixed economy. (See World Bank, 1994.) At the time of the study, there were indications of policy emphasis in former socialist countries moving towards a mixed economy.

Watson (1994) claimed that this was very much the result of pressure from bilateral and multilateral organizations on sub-Saharan Africa.

This view was reaffirmed in interviews with educational leaders in Africa. The role and pressure of the IMF in the restructuring and liberalization of economies are reported on Tanzania, Kenya and Zambia.

(3) Increased privatization

The challenge of moving towards a free market economy is also a challenge for the privatization of state-owned companies. Recently both the state-owned Zambia Airways and Zambia Bus Service were liquidated and private sector companies invited to take over these services. Essentially, privatization implies that the state's role changes to promoting entrepreneurship by creating an enabling economic and social environment capable of sustaining a dynamic and expanding private sector base.

The privatization trend also impacts on educational thinking. The private school movement in many of the countries visited seemed to be gaining ground as more and more parents have become disillusioned with the deterioration of the quality of education in state schools. Concurrently, there is a growing need to move away from the ideal of "free" primary education to sharing at least some of the costs of education. This is in line with World Bank thinking of shifting some of the costs of education away from the government (World Bank, 1994) and for increased privatization of education. (World Bank, 1988)

(4) Reducing debt

Extended droughts, variable export markets, poverty and poor management of resources and the economy have led to a demand for assistance from the international donor community in the development of countries in sub-Saharan Africa. This trend of a greater demand for foreign aid and loans counters the possible reduction of foreign debt. The result is that debt servicing costs escalate from year to year and became a major cost item in the budgets of all developing countries. In Kenya, for example, cost of debt servicing was equivalent to 24 % of its exports, while the cost of debt servicing in Malawi escalated to 41 % of its exports at one stage in the eighties. If African countries cannot address their debt successfully, the possibility of economic development will be slim.

(5) Strengthening multiparty democracy

Tanzania, Kenya, Malawi and Zambia created strong socialist oriented one-party states in the early post-colonial era. In recent years the international move towards multiparty democracy has also influenced these countries. It was noted that the liberalization of political processes in these countries has almost been forced onto them. This implies that leaders of these countries do not strongly associate themselves with the ideals of multiparty democracy and that the man in the street does not fully appreciate what multiparty democracy entails.

The ignorance of the man in the street regarding political processes was well illustrated by a nightwatchman in Mpika (Zambia).

This man claimed to have voted for the *Movement for Multiparty Democracy* which gained power in the elections. Yet, he felt terribly disillusioned by the outcome because the new government did not improve the conditions in the country (deteriorating conditions were very much a result of the structural adjustment programme forced onto the government). For him the structural adjustment programme of the government, the liquidation of Zambia Railways and the escalating costs of living were signs that the new government was worse than the old one. Without proper political education of the masses, multiparty democracy cannot bring true reform to these countries.

4.2.2 Economic/technological challenges

(1) Increasing the industrial base

Sub-Saharan Africa cannot compete in international markets if it cannot increase its industrial base. This implies that leaders will have to stimulate the establishment and development of industries capable of catering for people's basic needs (clothing, food, footwear, construction material, pharmaceuticals, etc). This is essential to minimize countries' dependency on imports. Such a strategy will also increase the ability to generate employment opportunities and, at the same time, reduce import budgets. Adding value to mineral exploitation by establishing secondary industries aimed at refining crude minerals should be a second major focus and should gain importance over the next decade. The same applies to agricultural development which will have to be integrated and synchronized with industrial development.

If countries in Africa can succeed in expanding their industrial base, they would ensure that new employment opportunities are generated which would in turn, ensure that education becomes more demand driven.

(2) Developing alternative sources of energy

In all the countries studied it was found that oil imports constituted a major part of their total import budgets. This dependence on oil imports for energy needs must be reduced and implies finding and utilizing alternative sources of energy. In part, this could be done through the greater development of hydro-electric potential and exploitation of renewable sources of energy (such as solar power and bio-gas).

(3) Development of appropriate technology

Africa is much too dependent on imported technology. Many of these technologies are too expensive and advanced for consumption in the rural parts of Africa and cause maintenance and sustainability problems. Appropriate technologies such as bio-gas and small-scale hydro-electricity must be explored and advanced. The type of work done by the Jua Kali in Kenya could serve as a possible example for the development of indigenous technology.

The name itself, (*Jua Kali*), means *to be in the open sun*. The Jua Kali is a group of people operating in the informal sector often, not so much by choice, but as a last resort. The main characteristic of these people is their ingenuity in providing alternative goods and products for the wananchi (people). From waste and scrap metal they are producing substitute technological products for a wide array of products, including kiondo (bags), ceramic tiles, building blocks, sisal fibre tiles, multipurpose chairs, woodworking machines, electrical appliances, fish flies, dyes, car rims and much more. There is no formal training for the Jua Kali. They learn their trade through a sit-by-Nellie or hands-on approach. This implies that there is no specific structured training or certification. Yet they are fulfilling an important role and are producing products developed through appropriate technology and aimed at the needs of people living in Third World conditions.

(4) Modernizing agriculture

Subsistence agriculture still forms the basis of agriculture in many African countries and, although this form of agriculture does have a role to play, it does not meet the basic needs of countries. On the contrary, it often harms the environment because of the outdated and unproductive farming techniques used. It is essential that agriculture be modernized and that microfarming and irrigation schemes be developed to ensure that the basic food needs of countries are satisfied.

(5) Developing tourism and ecotourism as potential sources of income

Tourism has never been well developed as an industry base in Africa, except in Kenya where it is fairly well established. Yet, there are vast stretches of land that are unspoiled and undeveloped and suited to the development and promotion of ecotourism. Tapping into this source of foreign revenue will be important for the future development of Africa especially in terms of earning foreign exchange.

(6) Promoting intercontinental and international trade

Many of the countries in Africa are landlocked and dependent on their neighbours for imports and exports. This means that they have little control over the quality and efficiency of export ports. Similarly, they have very little control over the political stability of their neighbours and may, in times of instability, be forced into having to use longer and more expensive alternative routes - this happened to both Malawi and Zambia. Delays in imports and exports result in price increases which can hit the already dwindling economies hard. An example of such extented delays was found in Dar es Salaam where President Mwinyi had to order harbour warehouses to be cleared of stock which had been awaiting customs clearance for more than six months. In Mombasa a similar situation prevailed. The addressing of these types of problems will necessitate the creation of trade agreements and customs unions in the interest of the development of the region as a whole.

(7) Improved communication systems

Years of inadequate maintenance has rendered much of the communication infrastructure (roads and telecommunication) in serious need of rehabilitation and upgrading. None of the abovementioned steps can effectively take root without urgent attention to the latter.

4.2.3 Resolving issues of labour

(1) Improved productivity

Productivity in Africa is among the lowest in the world. No modern economy can survive or develop if its labour force is unproductive.

Rationalization of state bureaucracies is no guarantee for improved productivity. The labour force must be trained more effectively and sound human resource development programmes developed.

(2) Solving the unemployment problem

Oh, why don't you work like other men do?
How the hell can I work when there's no work to do?
(From: Hallelujah, I'm a bum)

In 1994, industrialized countries alone had 36 million people out of work (Time, 7 February 1994) and the situation was far worse in sub-Saharan Africa. It was pointed out that in Africa (1989) some 100 million people were unemployed. (*SA Economist*, 1990) The attempts at the vocationalization of education of the seventies and eighties, as well as efforts to stimulate the informal sector, were mechanisms aimed at alleviating the plight of the unemployed. None of these has thus far succeeded. This does not mean that these strategies have no value or no contribution to make, but they are panacea. New strategies will have to be developed. Incentives aimed at stimulating the process of job creation in the private sector should be developed, while some nationally launched schemes should be investigated.

(3) Coming to terms with expatriates

There was a time when the Africanization of the services sector and the promotion of the indigenous labour force were of paramount importance. The result has been the "importation" of technical assistance and expatriate labour to fill middle management and professional positions where local expertise has not been available. This has not brought permanence to the employment sector, but resulted in continuous personnel turnover as contracts are for a relatively short period. Very often the only real impact has been that these categories of staff have drained scarce resources as they have been paid higher salaries than those which were paid to local people. Countries in sub-Saharan Africa will have to decide whether they would like to remain dependant on expatriate labour with all the sensitivities surrounding the issue or whether they would like to offer permanent residence to foreign experts willing to assist with the development of the country.

4.2.4 Social and demographic challenges

Economic growth is often regarded as a precursor to raising the quality of life of a growing population. Throwing money at the problems associated with a Third World population simply is not enough. Individual, family and community enrichment is essential to economic development which should be tied to the improvement of health, housing, education and welfare.

(1) Addressing national issues of health

It is commonly accepted that there is a direct link between poverty and poor health. Sub-Saharan Africa, being a highly impoverished area, is no exception. It is home to many endemic diseases (AIDS, malaria, bilharzia, yellow fever, cholera), while overall health conditions are worsened by starvation and malnutrition. These diseases and conditions hinder the improvement of the quality of life of a large percentage the population. The combating of famine and malnutrition, as well as the spread of endemic diseases will have to feature high on the agendas of these countries and will exert great pressure on the treasury. Furthermore, programmes to improve population health will have to demand a fair share of international donor aid. Again, education could play an important role in teaching people about the spread and prevention of diseases. Yet, one should not see education as the total answer to these problems.

(2) Addressing population growth

Africa has a most dramatic population growth pattern. Between 1985 and 2000 the growth in the number of 5-14 years olds is expected to increase by about 60 %. The implications of this are wide-ranging. Not only does it place an exceptionally high burden on the treasury to provide school places, but it will also result in a high dependency ratio per family which will aggravate problems of health, unemployment, crime and associated difficulties. (World Bank, 1990; Watson, 1994) Population growth must be contained. This will demand the development of strategies sensitive to the situation of rural people and acceptable to traditionally oriented people with little or no education. In some urban centres (e.g Nairobi) a lower population growth rate has already been reported. (Kenya Times, 1995) This, in a certain sense, is the result of the harsh economic reality of the city where people cannot afford education and other social services.

(3) Promoting the position of women

Gender inequalities abound in Africa. The participation rate of females in secondary and higher education remains low. This is especially evident in the low number of females enrolling in scientific and technological fields. According to Orodho (1990) only 15 % of the students enrolled for science courses at university level in Kenya were women and in engineering only four percent.

In discussing the marginalized position of girls in the education system in Malawi, Kibera (1994) pointed out that girls were generally expected to perform house chores not expected from boys, that in certain communities early marriages were arranged and some girls also dropped out as a result of a lack of funds or early pregnancies.

(4) Stemming the tide of crime and violence

Crime rates in Africa are alarmingly high. These include both white collar crime (like corruption) and violent crime (robbery, theft, rape, assault, murder). Linked to these are rising levels of drug trafficking, drug abuse and prostitution. Solutions to these problems are not easy where unemployment, poverty and famine abound. However, it will be essential to find mechanisms to address these issues effectively and to create an environment conducive to growth and stability.

(5) Urbanization

Many of the agricultural development programmes of the past and educational strategies such as Education for self-reliance in Tanzania were aimed at keeping people in the rural areas. These have not succeeded. Urbanization is a fact and it must be accepted and integrated into future planning. Growth points of industrialization in rural parts may be a solution, but will not stop the migration to larger cities. Megacities will be a phenomenon of the future and must be managed as such.

(6) The position of minorities and marginalized communities

Africa has many marginalized communities and minorities. These have been created by colonial boundaries that were drawn without regard for the indigenous people, and also by religious affiliation, socio-economic factors, ethnicity and regional wars. These people do not have the financial means nor political clout to muster support for their cause. In developing education policies, an awareness of and consideration for these people should inform these policies to support the effective integration of these people into the mainstream of society.

4.3 GUIDELINES FOR EDUCATIONAL POLICY DEVELOPMENT

While it is acknowledged that conclusions about success and failure are often subjective, it must be admitted that, in general, the results of education policy in Africa have fallen short of expectations. In a policy document released by the World Bank (1988), the whole African dilemma was analyzed and wide-ranging recommendations were made. The World Bank stressed the need for each country to develop its own country-specific education strategy and policy, taking into account the country's unique circumstances, available resources and cultural heritage. The World Bank (1988: 93-100) gave the following framework for the restructuring of education systems in Africa:

Adjustment to current demographic and fiscal realities. This should take two forms

- diversifying sources of finance through increased cost sharing and promotion and tolerance for educational provision by non-government institutions and
- containing unit costs.

Revitalization. A renewed commitment to academic standards by strengthening the examination systems, restorating an efficient mix of inputs into the system (e.g. textbooks and other learning materials), and a greater investment in the maintenance of facilities.

Selective expansion. This should concentrate on four areas, namely renewed progress toward the goal of universal primary education, alternative means of delivering education (e.g. distance education), increased training for those who enter the labour market and research and increased post-graduate education.

The World Bank policy paper was controversial on more than one issue. Its emphasis on the "harsh" decisions that had to be taken to put education back on track in Africa, was met with criticism from African academics and politicians. The fact of the matter, however, is that World Bank policy tends to influence bilateral and multilateral donors alike. No sub-Saharan African country can therefore ignore the policy guidelines recommended by the World Bank.

From the study of the process of policy development and implementation in a number of African countries, it has become evident that the design of sound and realistic education policy depends on:

- the ability to collect and analyze social and educational data relevant to the educational policy[29] and
- the ability to integrate the education policy with fiscal and monetary planning taking into account the priorities and resources available (and taking into account the external factors impacting on the country and on education).

At the same time, the success of any education policy lies in the implementation thereof. This implies that

- the implementation must be well managed and administered, which in turn implies that
- the commitment of the government, departmental staff, teaching profession and community at large must be secured for the intended reconstruction of the education system.

4.4 A POSSIBLE AGENDA FOR EDUCATION IN SOUTH AFRICA TOWARDS THE 21st CENTURY

One of the important questions that arises from a study of this nature, is the implications of the findings for South Africa in its own development of an education policy and its implementation. Similarly, it may be asked what the agenda for education development in South Africa should be if the trend towards the globalization of education is accepted.

The introduction mentioned that South Africa (as with other sub-Saharan African countries) is also faced with problems of high population growth, urbanization, cultural disruption and discontinuity, a shortage of high-level manpower and skilled workers, low productivity levels and a shortage of financial and other resources. (See also Erasmus, 1991:17.)

The report of the National Educational Policy Investigation (NEPI) (1993) claimed that the level of education and skills of the South African workforce falls far below that of workers in most other successful economies. Perhaps more serious is the low level of skills of the majority of the unemployed, as well as workers in the informal sector. This is despite the fact that companies in South Africa spent R3,8 billion on education and training in 1990, which represented 16,8 % of the total expenditure on education and training (R22,7 billion). (*The Star*, 1992)

These trends are exacerbated by the fact that the education system inherited by the new democratic government, is highly segregated, unequal and fraught with inequities. The paramount task of the new government is to build a just and equitable system which will provide good quality education and training to learners throughout the country. (See White Paper on Education, 1995.) In this sense, at least, there seems to be much in common with the African countries discussed in the report.

What seems to be important is the process that will be followed in the development of an education policy and its implementation in the "new" South Africa. Past education policies were very politically oriented in nature and implementation. This does not mean that research investigations were not commissioned by former governments, but rather that those commissioned had to operate within the political ideology of the reigning government.

Given the political developments in South Africa since 1990, and in particular the debates within education, it would appear that a new form of policy development has emerged in South Africa. In fact, however, the interacting forces that shape the development of new policies are not new. In 1984 Margaret Archer already argued that education policies and systems are the products of power struggles between different social groupings. What is new in the South African context are the processes that shape policy development. These can best be described as negotiations.

Negotiation implies a process where social groupings from diverse and opposing stances, as well as people involved with the bureaucratic and political structures, mediate on issues of difference to produce a policy that is mutually acceptable.

The new White Paper on Education and Training (1995) produced in South Africa is a good example of such a negotiated policy. The White Paper evolved from, among others, the developments discussed below.

The *Education Renewal Strategy* published by the Department of National Education (1992) may be viewed as the last education policy document of the old regime. In its recommendations, it allowed for seven years of state-funded compulsory education and made provision for increased responsibility towards the financing of education by parents after the initial seven years. It also allowed stricter admission requirements for universities and technikons and closer links between the formal and non-formal sector. One of the most salient features of the ERS document was its emphasis on a curriculum shift from academically oriented to vocationally oriented education. This was set out in a document entitled *A curriculum model for education in South Africa* (1992) in which it was claimed that this model would contribute towards equal educational opportunities for every inhabitant of the country; recognize the diversity of languages and religions and provide education in an educationally responsible but flexible manner directed at the needs of the individual and society, as well as the demands of economic development and manpower needs. It stated that, during the first nine years, education would be of a general nature with a shift towards either generally oriented (academic), vocationally oriented or vocation education in the three years of postbasic education.

The *National Education Policy Investigation* (1993) (NEPI) was a project of the National Education Co-ordinating Committee. The objective of the investigation was to question policy options in all areas of education within a value framework derived from the ideals of the broad democratic movement. In its main report the committee foresaw an education system consisting of seven years of compulsory basic education with limited differentiation followed by a further two years of postcompulsory schooling providing at least some degree of differentiation. It was envisaged that TVET could form one possible avenue after compulsory schooling.

The NEPI document stated that a major challenge would be to develop a range of programmes that would cater for diverse vocational needs, rather than only for those of formal employment. For this reason, it was argued, vocational training had to be co-ordinated by the state, at least as far as its organization and financial provision were concerned.

One of the options identified by NEPI was the creation of a national vocational qualifications curriculum council and a national qualifications board. It was stated that TVET skills should be portable and certifiable and equivalent to skills and certificates in the formal sector. It was argued that this would enhance mobility between the formal and non-formal sector and would also promote equity.

Many of the same sentiments were echoed in the ANC Policy Framework for Education and Training (1994). The framework stated that TVET was to be based on the principles of a high level general education, integrated vocational and academic curricula, as well as strategic but limited vocational diversification thus building bridges across previously fragmented modes of TVET.

At that stage, it was already clear that ideas had begun to converge on the development of a national qualification framework (See also *The National Training Strategy Initiative* released by the National Training Board in 1994) that would enable mobility between formal and non-formal education and would ensure a more equitable education and training dispensation.

In the light of these developments it was no wonder that the creation of a South African Qualifications Authority (SAQA) formed a major focus of the White Paper on Education released in March 1995. Legislation for the establishment of SAQA was promulgated in August 1995. As far as this development is concerned, it could be argued that the policy was the culmination of a process of negotiation and discussion. It moved beyond the point of pure political manoeuvring to a point where all relevant stakeholders were involved in discussion and policy development.

This trend is not unique to the SAQA. The same procedure was followed in developing education policy in other sectors of the education system.

With regard to the issue of education policy implementation, it will be difficult to extrapolate from existing documentation what processes will be involved. From the Interim Constitution (1993) and the White Paper on Education and Training (1995) it may be assumed that provision will be made for a transparent and democratic system which allows for participation from parents, the community and industry. It is, however, too early to pass judgement on these as many of the structures required are not yet in place.

Earlier sections of this report outlined a possible agenda for education policy in Africa. From the findings of the study and in the light of development in South Africa, the following possible agenda for education development is proposed. This agenda takes into consideration the globalization trend as well as the need to redress and reconstruct education.

4.4.1 Universal basic education

It is generally accepted that quality primary education will bring the highest social and economic returns. (World Bank, 1990; Psacharopoulos, 1990; Jomtien Conference, 1989) Empirical research (Psacharopoulos, 1990; Fuller, 1991; Delacroix and Ragin, 1978) generally demonstrates the positive effect of education on economic development and a strong association with an improved physical quality of life. (Bradshaw, 1993) This sentiment can also be found in the White Paper on Education (1995) when it states that successful modern economies and societies require "citizens with a strong foundation of general education ...". (White Paper, 1995: 15)

However, it would be a fallacy to think that any kind of education would yield the necessary returns. Relevant quality basic education seems to be the key concept. Besides providing the traditional skills of reading, writing and mathematics, quality universal basic education should build a strong foundation in reasoning skills, logical thinking and effective communication as well as strengthen the social values of the community and foster a work ethos.

This does not mean that vocational skills should be introduced at basic education level or that certain work-related activities should be introduced. But it does imply a commitment on the part of all concerned with education (administrators, teachers, parents, the community and children) to ensure the best quality education at primary school level.

Only if South Africa can ensure that it offers quality education at basic education level, will it be able to offer children a solid springboard to further education and the world of work. The importance of ensuring universal basic education should not be underestimated. Nieuwenhuis et.al. (1994) indicated that the participation rate of children of primary school age in South Africa was 65 %. If the large percentage of children not at school is not addressed, the long-term effect on the country will be horrendous.

4.4.2 Science and technology

As the world is moving at an accelerated pace into new scientific and technological fields, it places new demands on education systems to prepare the upcoming generation for the realities of the world. It has been pointed out that Africa, much like South Africa, is producing vast numbers of people with qualifications that are not in demand, while industry looks for people with scientific and technological know-how. This does not mean that every student produced by the system must be a scientist or technologist, but, in Sifuna's words "*What is obviously clear is that the real development test of education is not merely whether its holder can step into an existing job in an existing organization, but whether he or she can in addition, perceive new opportunities, initiate new departures, and organize human and material resources to carry them to a successful conclusion*". *(Sifuna, 1993: 102)*

If South Africa wants to develop economically, it must strengthen scientific and technological education. Again, the White Paper on Education (1995: 22) emphasizes the importance of appropriate mathematics, science and technology to stem the waste of talent and to make up for the chronic national deficit in these fields of learning.

Improving scientific and technological education at primary and secondary school level should not, in the first place, be aimed at producing manpower for specific categories of jobs. It should be aimed at developing an understanding of and appreciation for the products of technology and at stimulating the kind of thinking and reasoning that would enable students to observe phenomena, identify problems, conceive new ideas, analyze problems, examine solutions, distinguish between alternatives, comprehend technical documents and visualize the results of a solution.

4.4.3 Vocationalization of education

One of the controversial issues at the moment centres on the vocationalization of education. From observations made during this study, it seems impossible to avoid this controversy which is based on the question of whether education follows economic development or leads economic development.

> *If education is to lead development, this situation should be reflected in the content of education in terms of curricula which promote knowledge and skills for enterprise, could lead to fulfilling informal sector jobs, and could promote a possible growth potential in the dominant informal and rural settings.* (Buchert, 1994: 171)

In a recent study (*Forum*, 1994) it was found that education is best able to meet the requirements of industry and economic development if a specific demand for certain categories of trained people exists. Contrary to this, vocational education and training seem to be less effective if they are supply based. It may therefore be argued that an investment in sectors of the economy that would create employment opportunities, even though this may in the short term mean importing foreign expertise, is preferred as it would ensure that education becomes more demand driven.

This line of reasoning implies that stimulating economic development aimed at generating foreign revenue will promote the creation of employment opportunities which, in turn, will generate funds for investment in demand-based vocational education and training. This argument is schematically represented in Figure 4.3. If the line of reasoning set out in Figure 4.3 is followed, then vocational education is best offered after good basic education has been secured. (See World Bank (1988); Tempest (1992: 116).).

The White Paper on Education (1995) suggests an integrated approach to education and training which rejects a rigid division between academic and technical education. "*Such divisions have characterised the organisation of curricula and the distribution of educational opportunity in many countries of the world, including South Africa. They have grown out of, and helped to reproduce, very old occupational and social class distinctions.*" (*Ibid:* 15) The integrated approach is linked to the new National Qualifications Framework to be developed by SAQA which will be based on the recognition of learning attainments wherever education and training are offered.

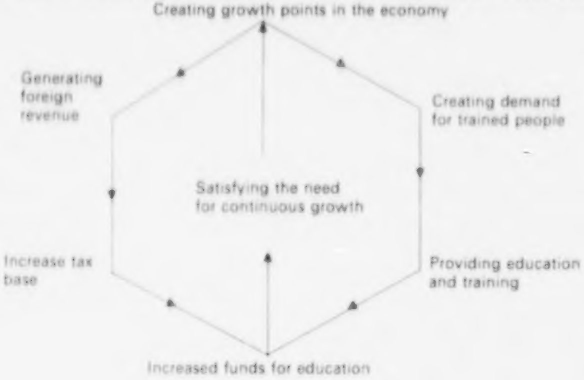
4.4.4 Quality education

Quality education is essential if South Africa is to meet the challenges of development. (White Paper, 1995) Quality education, as was indicated earlier in the report, cannot merely be measured in terms of academic performance. It concerns the inputs, processes and outputs of the education system. Quality education implies that minimum standards will have to be determined for schools in terms of size, level of training of teachers, learning materials available, curricula offered, methods of instruction, assessment and evaluation, as well as for the overall management of the school.

4.4.5 Cost sharing

The White Paper (1995) sets the ideal of *universal free and compulsory basic education* to ensure that all citizens have access to education of equal quality.

FIGURE 4.3
CREATING A DEMAND FOR EDUCATION AND TRAINING


Creating growth points in the economy
Generating foreign revenue
Creating demand for trained people
Satisfying the need for continuous growth
Increase tax base
Providing education and training
Increased funds for education

This ideal is, of course, important to the aims of redress and to the Reconstruction and Development Programme of the government. However, this ideal cannot be supported in the light of economic and fiscal realities. At the same time it must be accepted that school fees can create disparities in the education system which will result in unequal education. A system of cost sharing should be developed that will ensure that all people will have access to universal basic education. At higher levels of the education system parents should be expected to contribute more to the education of their children. At the risk of disadvantaging the poorer sectors of the community, state subsidies or loans (at tertiary level) should be considered.

4.4.6 Effective management

One of the principles accepted in the White Paper on Education and Training (1995) is that of democratic governance at every level of the system. The test for an effective and efficient education system will lie in the degree to which effective management can be secured. The implication is evident: investment in the training of managers at all levels of the education system will have to be a priority. This should be extended to the training of school management boards.

4.5 CONCLUSION

The implementation of the White Paper on Education in South Africa is the responsibility of the Department of National Education and the provincial ministries of education as well as that of parents and pupils.

In implementing education policy the departments of education will have to seek and secure the support of the local community, parents and pupils and take cognisance of their demands and expectations.

The extent to which the ideals set out in the White Paper (1995) will be realized, will be reflected in the procedures developed; the allocation of funds; the curricula developed; and the mechanisms installed to regulate the interaction between policy formulators and implementers, as well as between implementers and the school and community itself. Furthermore, the implementation of an education policy will demand that the Ministry for Education takes responsibility for managing the transformation and redirection needed to eliminate the inequities and discrimination of the past and accepts the challenge of creating a system which cultivates and liberates the talents of all the inhabitants of the country. (See White Paper on Education and Training (1995).)

In practical terms this means that the Ministry of Education must, through a process of redress

- expand education opportunities to those who have been marginalized in the past,
- eliminate the disparities in the system by levelling the playing field,

- ensure relevant education of an acceptable standard, and
- strike an acceptable balance between general formative education and vocationally oriented education.

This challenge will force the government to seek new avenues of revenue. Increased cost sharing through mechanisms of increased taxation or greater parental contributions may be less feasible as it may put those who are already disadvantaged in a more difficult position. Therefore, the government may look at donor aid as a short-term solution to some of its education problems.

ENDNOTES

29 The International Institute for Educational Planning has taken the initiative to support and train educational planners in eight southern African countries to set up databases which will facilitate educational policy planning.

CHAPTER 5

POLICY OPTIONS FOR DONOR AID

5.1 INTRODUCTION

It would be unrealistic and presumptuous to think that a study of this nature could offer a clear-cut outline for policy formulation regarding donor aid to South Africa. Every country is unique in its social, cultural, economic, political and demographic make-up. The way one country responds to and utilizes aid cannot be replicated in another country. A country must take into account its own set of unique circumstances and requirements. (See Hopkin, 1994) Nevertheless, certain broad parameters and criteria were identified which could assist with the formulation of a policy for donor aid.

5.2 MACROTRENDS IN BILATERAL AND MULTILATERAL AID

Although some disagreement may exist, it is accepted that Africa has enjoyed substantial international assistance. Over the last five years special efforts have been introduced to expand aid flows to Africa. The Special Programme of Assistance of the World Bank, for example, provides highly concessional quick disbursing finance to low-income countries in sub-Saharan Africa.

As far as bilateral aid is concerned, there has also been an increase in recent years despite the international economic recession. In part this may be the result of the political liberalization process in Africa. However, this process has, itself, created a number of uncertainties which may negatively impact on the flow of donor aid. Multiparty democracy has brought with it a fragile stability and offers no guarantee of sustained economic growth as short-term improvements cannot always be demonstrated by the new ruling parties.

Donor aid, whether bilateral or multilateral, is often dependent on the recipient country's commitment to the development agenda and the extent to which this is aligned with internationally perceived agendas. Experience has shown that aid conditionality has worked best when it has been nothing more than an affirmation of the government's own set of priorities. Where substantial differences have existed, the impact of the aid on real development has been minimal.

Finally, bilateral and multilateral aid flows will very much be determined by a country's unique position. There seems to be a greater realization among donor aid countries that countries in Africa cannot be treated similarly, but that there is an ever-increasing diversity requiring a unique approach to each country. Within the education sector, attention is being focused on how to develop sound sectoral goals and strategies, promote ownership and commitment, build implementation capacity, improve counterpart support, revise procurement and disbursement methods and put in place effective systems for evaluation and monitoring. (DAETF, 1993)

5.3 RESOLVING POLICY ISSUES

In resolving policy issues, African countries and donors have to address a number of issues:

- *Goals for education*

In the past many of the educational policies developed in African countries had political agendas, set unrealistic or ambiguous goals and were often not translated into clear objectives and programmes. Donors, on the other hand, often had their own goals which were usually reflected in the conditionalities attached to loans and grants for education. This does not mean that there may not be merit in the goals set by a donor, but it does create a situation in which goals are imposed by an external source making it difficult to generate a sense of ownership in the recipient country. The best way of dealing with this is to set up forums or consultative meetings where different agendas are discussed and consensus achieved.

- *Programme design*

Programmes designed by donors based on information and experience from the country of origin are likely to fail. The use of good quality information for programme development in an African country is essential for the design of a programme which takes into account sectoral reviews, the time needed for effective implementation, resources available for local support and the sustainability of the programme.

- *Implementation issues*

A paper presented before the DAETF in 1993 stated that the declining resource base for public programmes in Africa had resulted in the demotivation of public officials and a growth of corruption in the public sector. Simultaneously, poorly developed communication networks have aggravated this situation. The declining resource base also affects human resources as programmes implemented through expatriate technical expertise are often terminated at the end of the donor participation period. Building the capacity of local people to manage and implement a programme is essential and should form the basis of all projects.

- *Sustainable financing*

Donor aid for educational programmes aimed at complementing locally financed projects has a better track record of long-term sustainability than programmes for which all funds were generated from external sources. Many governments are, however, not in a position to offer counterpart funding at acceptable levels thereby putting the project's long-term success in jeopardy.

5.4 PITFALLS IN DONOR AID

An analysis of donor aid to the countries studied revealed a number of concerns that should be taken into account in developing policies on donor assistance.

5.4.1 Boomerang money

Many donor aid projects are based on the giving of equipment and materials and, although the total amount of the donor aid may sound impressive, the actual expenditure reverts back to the donor country which procures the material and equipment from its own industries, thereby indirectly benefitting itself. Various examples were quoted, one of which was a US$10 million project on technical education upgrading which resulted in US$9 million being spent on buying equipment and material from the donor country. In another case the total amount of the loan secured was used to buy equipment from the bilateral donor.

The same principle applies to technical assistance and scholarships. The World Bank (1988) stated that technical assistance is little more than the creation of employment opportunities for personnel from donor aid countries operating in a developing country.

Similarly, the granting of scholarships means that funds allocated are actually paid to universities and training institutions in the donor country. This practice still pertains to many of the donor aid projects. The argument is that the person who is trained through a scholarship programme will return with newly acquired skills and expertise that could be put to use in his country of origin and thus benefit that country. This argument holds true if similar training is not available in the country of origin and if the person who was trained returns and stays in the country. The "brain-drain" syndrome is common in Africa as qualified people can often earn better salaries as expatriates in neighbouring countries.

5.4.2 Time limits

All donor aid projects are time based. The period may vary from two to five years and seldom goes beyond a five-year period. After completion, the project must be sustained locally in terms of resources and personnel. Numerous examples were found where this did not happen in practice. One such example was a five-year German vocational training project where, on expiry of the project, the person who had to take over the project had not been adequately trained. As a result the project lost momentum and sustainability. If it is accepted that results in education only become visible in the longer term, then projects with a short duration may not show the results expected and may be prematurely terminated.

5.4.3 Donor agendas

It stands to reason that a donor will have his own preconceived ideas about the kinds of project that should be invested in.

These priorities may be determined by political factors, the available expertise base or economic considerations. In the past, for example, Botswana was favoured as a recipient of donor funds because of its stance against apartheid and its position in relation to South Africa. The same principle applied to Lesotho. On the other hand, donors can also use their funds as leverage against a government, as with the suspension of bilateral and multilateral aid to Kenya and Malawi because of their human rights records.

Specific donor aid projects may also be "forced" on a recipient on a take-it-or-leave-it basis. Here, Botswana has displayed great resilience by putting its own interests first and refusing aid that did not satisfy the priorities of the government. In many cases extended negotiations resulted in donor aid being invested in priorities identified by Botswana.

Zambia, on the other hand, must take what it can get while Lesotho's development plans are conceptualized through donor assistance.

The agendas of donor aid countries may also differ. It is well known that for many years Germany favoured investment in technical and vocational education and has to some extent actively promoted the German "dual" system of training. At the same time, the Scandinavian countries have tended to give preference to projects aimed at basic education. These differing agendas may result in clashes of interest between donors and their approach to education which, in turn, may disadvantage the recipient country. In cases where this happens, it may create a degree of discontinuity in the education system and tension between donor aid countries.

5.4.4 Disparity in donor investment

The amount and kind of investment from a donor aid country will differ from project to project. Two countries may therefore invest in the same education sector but with two different institutions as targets. Because of the different sizes of the investments the two institutions may gain disproportionately and the system may be skewed. It may also be that opportunities are created in one subsector in the system but not at the next level, thus causing a bottleneck. For example, building new primary schools without a corresponding investment in teacher training will result in a shortage of teachers. To address this problem, unqualified teachers may have to be appointed and standards may drop.

5.4.5 Creating a spiral of dependency

One of the main risks run by a country relying on donor aid is to become permanently dependent on aid. This risk corresponds closely with the economic position of the country. In Zambia, Tanzania and Lesotho, where population growth totally outstrips economic growth and where the economic recession seems to be deepening to the extent that these countries cannot meet their recurrent budget for education, their dependency on donor aid is evident. Officials seem to agree that for the foreseeable future there will have to be an increase in donor aid rather than a scaling down.

This is a sad state of affairs as it renders sound educational planning almost impossible and means that the development of education is subject to the willingness of donor aid countries to invest in it.

5.4.6 Counterparts and counterpart funding

A basic principle in donor assistance is that the recipient country would meet the donor contribution by making funds, equipment or resources available to meet the contribution of the donor. At the same time the recipient is also expected to make a counterpart available to work with the experts or consultants designated to the project. Such a counterpart acts as a co-ordinator and local contact person and in return is trained in the operation of the project. This implies that the counterpart should possess certain skills and knowledge to ensure the successful implementation of the project. It is also expected that this person will continue with the project once the donor's involvement has been concluded.

Although the principle is sound, the implementation thereof in many developing countries in Africa has been problematic. Many countries, especially after gaining independence, have experienced a dire shortage of highly skilled personnel and have found it difficult to release a trained person as a counterpart. To aggravate matters, many of those used as counterparts gained skills by participating in the donor project and as a result were then promoted to higher positions thus leaving the project without a trained person to continue the work. Lately the issue has been complicated by the fact that countries have been pressurized by the IMF and World Bank to cut down on their civil service component as part of their programme of economic restructuring while they are still expected to meet the needs of donors in providing counterparts.

Linked to the counterpart issue is the problem of counterpart funding. Many countries cannot meet the counterpart contribution without cutting expenditure to other sectors of the education system. In Kenya, for example, the move towards vocationalization in education in the seventies forced Kenya to allocate funds earmarked for harambee schools to the vocationalization effort. Zambia finds itself in a situation where it can at best make a counterpart contribution in kind (making personnel and offices available).

5.5 GUIDELINES FOR A POLICY ON DONOR AID IN SOUTH AFRICA

The important decision which South Africa should take is whether it wants to become a recipient of donor aid or whether it wants to be a donor aid country or a combination of both. The last option may sound like a contradiction, yet this was the route taken by Japan for many years. In the fifties, Japan borrowed large amounts of money as a donor recipient to finance projects in Japan. In the sixties it became a donor aid country while retaining its donor recipient status. (JICA, 1994) By 1994, when its last debt was repaid, it also became the world's largest donor aid country.

It is not an easy task to decide on the position to be taken regarding donor aid, nor is it necessarily a purely economic decision. The overall development programme, as well as the reconstruction and development aims should be taken into consideration.

Observations made during the study, indicate that educational decision makers should guard against hasty decisions to accept donor aid. South Africa should judiciously decide on which projects need assistance, the volume of assistance needed, and the time period of the assistance and avoid an influx of aid that is diversely spread over too wide an area with limited effect. The Reconstruction and Development Programme of the government could serve as an instrument for deciding on the type of assistance needed.

At the same time, South Africa should also investigate the possibility of becoming a donor aid country to Africa. This could take the form of technical advice, scholarships or limited funding of projects of bilateral or multilateral interest in southern Africa. If South Africa neglects its role in assisting with the development of growth points in southern Africa, it may find itself inundated with migrants from Africa looking for employment in South Africa at the expense of our local workforce.

Should South Africa decide to become a recipient of donor funds, it should consider the following as guidelines to its donor policy:

5.5.1 Collaboration among donors

Where a number of donors are involved there is always a risk that their interests may clash and that they may, although with good intentions, work against each other thereby fragmenting the education system and causing an uneven development in which certain sectors are developed to the disadvantage of others. Collaboration among donors has been stressed for over a decade. (See Mosley, 1986; Hopkin, 1994.) However, in the countries studied numerous examples were found of a reluctance on the part of donors to collaborate. In the event of South Africa becoming a recipient of donor aid, it should build in mechanisms to ensure collaboration of donors not only within education, but for all projects for which donor aid is secured.

5.5.2 Management of aid

The importance of the effective and efficient deployment and management of aid cannot be over-emphasized. Nothing taints the image of a recipient as much as the mismanagement of funds. Aid must be deployed and utilized for the purposes intended. The efficiency, prudence and integrity of the civil service in ensuring this is of paramount importance.

5.5.3 Integrating aid into development planning

Aid should be integrated into the development plans of the recipient. The results should be tangible and should be subjected to ongoing evaluation to ensure that the aid supports the realization of the development aims. The Reconstruction and Development Programme of the government could be the yardstick for evaluating possible donor aid projects.

5.5.4 Local support for donor aid

Donor aid is generally based on participation with local officials. The availability of local expertise to collaborate on the project and to take over ownership of the project on its completion is essential to the long-term success of the endeavour. This implies that local expertise must be readily available or people should be trained in the shortest possible time to ensure that the country does not become dependent on expatriate expertise. This does not only apply to technical expertise, but also to management expertise.

5.6 CONCLUSION

The report focuses on two important issues: the process of education policy formulation and the implementation of education policy. A conviction which guided educational policy formulation in Africa, was that education was the way to ensure economic growth, to restructure the social order and to reduce the social ills of society in general.

One of the important underlying themes of the report is that the globalization of education impacts directly on the development of education policy in developing countries. Internationally, in both developed and developing countries, the focus within education policy development has shifted over time. It seems obvious that these shifts in concentration have had a direct impact on educational planning in developing countries and on the flow of donor aid. This assumption was tested in the study of the eight African countries discussed.

In analyzing the experiences of the African countries studied, it became clear that there was a disparity between the formulation of educational policy and its implementation in the context of the wider socio-economic and political developments. With these findings in mind, it is important to reflect on the possible influence that research on educational development in Africa may have on policy development in South Africa and the extent to which the globalization of education will shape education policies in South Africa.

If it is accepted that education is a subsystem within the larger state and political dispensation, the government of the day must, preferably in consultation with its constituency, take decisions concerning education. In taking such decisions it should also consider its own political agenda as well as certain historical, socio-cultural, religious, and economic factors. The state, however, cannot operate in isolation from world influences and megatrends which will have to be considered in its policy formulation on education. Decisions taken by the government will be reflected in the policy developed, the finances funnelled into education and the objectives set for the education system. Sound research can provide the information needed by government to make informed decisions on future directions in education.

It is in this light that this study was done. It is trusted that it may serve as input to the debate on future education policy development especially in as far as developing a donor aid policy is concerned.

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APPENDIX A

LIST OF PEOPLE INTERVIEWED AND INSTITUTIONS VISITED

ALIDE, Y. Head, Technical Education, Polytechnic, Blantyre, Malawi.

BANSPACH, H. Director, Maditrelo Trade Testing Centre, Gaborone, Botswana.

BUCHERT, L. University of Stockholm[30].

CHIYENU, C.F. Deputy Permanent Secretary of Education, Ministry of Education, Zambia.

CHUBILI, S.M. Deputy Director, Department of Technical Education and Vocational Training, Zambia.

DLAMINI, B.N. (Dr) Registrar: National Examinations Council, Ministry of Education, Swaziland.

DLAMINI, E.M. Planner/Statistician, Ministry of Education, Swaziland.

DLUDLU, E.C.N. Chief Inspector: Primary Education, Ministry of Education, Swaziland.

HAU, J. Malawi Institute of Education, Malawi.

HOPKIN, A. (Prof) Co-ordinator, Affiliated Institutions, University of Botswana.

JEGEDE, J.O. National University of Lesotho, Kingdom of Lesotho.

KASANDA, S. (Dr) Permanent Secretary for Education, Ministry of Education, Zambia.

KHATI, T.G. (Dr) Principal Secretary of Education, Ministry of Education, Kingdom of Lesotho.

KIERNEN, M. Co-ordinator Primary Education Programme, DANIDA, Dar es Salaam, Tanzania.

LUAMBALA, V. Manager, Kamuzu Vocational Education Centre, Malawi.

LUKONGOLO, J. Director, Nasawa Technical Training College, Malawi.

MAGAGULU, A. Chief Inspector: Secondary Education, Ministry of Education, Swaziland.

MAKAKOLE, M. Chief Economic Planner, Ministry of Education, Kingdom of Lesotho.

MALIAKINI, S.M. Assistant Director: Malawi Institute of Education, Malawi.

MOAGHE, M. Trainer, Shashe Brigade, Shashe, Botswana.

MOGWE, V. Principal, Automotive Trade Training School, Gaborone, Botswana.

MOKETSI, J. Director: Technical and Vocational Education, Ministry of Education, Kingdom of Lesotho.

MOSHA, H.J. (Prof) Chairman Task Force on Education, University of Dar es Salaam, Tanzania.

MUNDY, K. Ontario Institute for Studies in Education, Canada.

MUPANGA, S.A. Director, Department of Technical Education and Vocational Training, Zambia.

MWENECHANYA, J.M. (Prof) Deputy Vice Chancellor, University of Zambia, Zambia.

MWENISONGOLE, H.K. Director Planning, Ministry of Education and Culture, Tanzania.

MZUMALA, I. Kamuzu Vocational Education Centre, Malawi.

NDABA, N. Senior Education Officer, Design and Technology, Ministry of Education, Botswana.

NGWENYA, L. Headmaster: Christ the King Primary School, Swaziland.

NJIRU, N.J. Commission of Higher Education, Kenya.

NOWA-PHIRI, M.D. (Dr) DSTC, Domasi, Malawi.

OMARI, I. (Prof) University of Dar es Salaam, Tanzania.

PHIRI, E.N. Deputy Permanent Secretary for Education, Ministry of Science, Technology and Vocational Education, Zambia.

SAIL, A.W. Senior Planning Officer, Ministry of Education, Swaziland.

SIFUNA, D.N. (Prof) Foundations of Education, University of Kenyatta, Kenya.

SIMELANE, S.N. Director for Education, Ministry of Education, Swaziland.

SOCHE TECHNICAL COLLEGE, Blantyre, Malawi.

ST BENEDICT PRIMARY SCHOOL, Swaziland.

SUMAILI, W.G. Principal Inspector, Technical Education, Ministry of Science, Technology and Vocational Education, Zambia.

TEMPEST, P.J. Senior Education Officer, Technical and Vocational Education, Ministry of Education, Botswana.

VAN RENSBURG, P. Education with Production Foundation, South Africa.

WEEKS, S. (Prof) Director, Graduate Studies and Research, University of Botswana, Botswana.

YOUNGMAN, F. (Prof) Member of the National Commission on Education, University of Botswana, Botswana.

ENDNOTES

30 Dr Buchert was interviewed during her visit to South Africa in 1994.

APPENDIX B

INTERVIEW SCHEDULE EDUCATIONAL DEVELOPMENT IN POSTCOLONIAL AFRICA WITH SPECIFIC REFERENCE TO THE INFLUENCE OF DONOR COUNTRIES

Name of respondent: ....

Position: ....

Country: ....

1. What would you describe as the most important achievements in education since your country's independence? ....

   ....

   ....

2. What would you describe as the single most important challenge to education in your country? ....

   ....

   ....

3. What has been the most discouraging development in education?

....

....

4. Does your country receive any donor assistance for the development of its education system? ....

....

....

5. Who are the most important donor agencies operating in your country and in which sector of the education system do they invest?

....

....

6. What was the contribution of these agencies to the development of the system? ....

....

....

7. To what extent do donor agencies support the education priorities of the government? ....

....

....

8. Was the amount of funding sufficient to make the necessary impact on the education system? ....

....

....

9. Was the duration of the commitment sufficient to make the necessary impact? . . . .

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10. Did donor funding in any way lead to the fragmentation of the education system? . . . .

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11. Given the fact that a developing country is dependent on donor funding for the development of its education system, should it have the right to determine the conditions of the investment and in what way? . . . .

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12. General comments . . . .

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Internationally, in developed and developing countries, the focus of educational planning has shifted over time. It seems fair to assume that such shifts have also had a direct impact on the educational policies of countries in sub-Saharan Africa as well as on the flow of donor aid. These assumptions were analysed in a study conducted of eight sub-Saharan African countries (Botswana, Kenya, Lesotho, Malawi, Swaziland, Tanzania, Zambia, Zimbabwe).

The study traces the process of educational policy development and implementation in the postcolonial era in each country. A basic premise is that the education system in any country is the result of a number of interacting forces in the unique historical development of the country. Finally, the author analyses such forces in terms of their relevance and applicability to the South African situation, especially as far as donor funding is concerned.

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